

Changing World- Common Ground 2005

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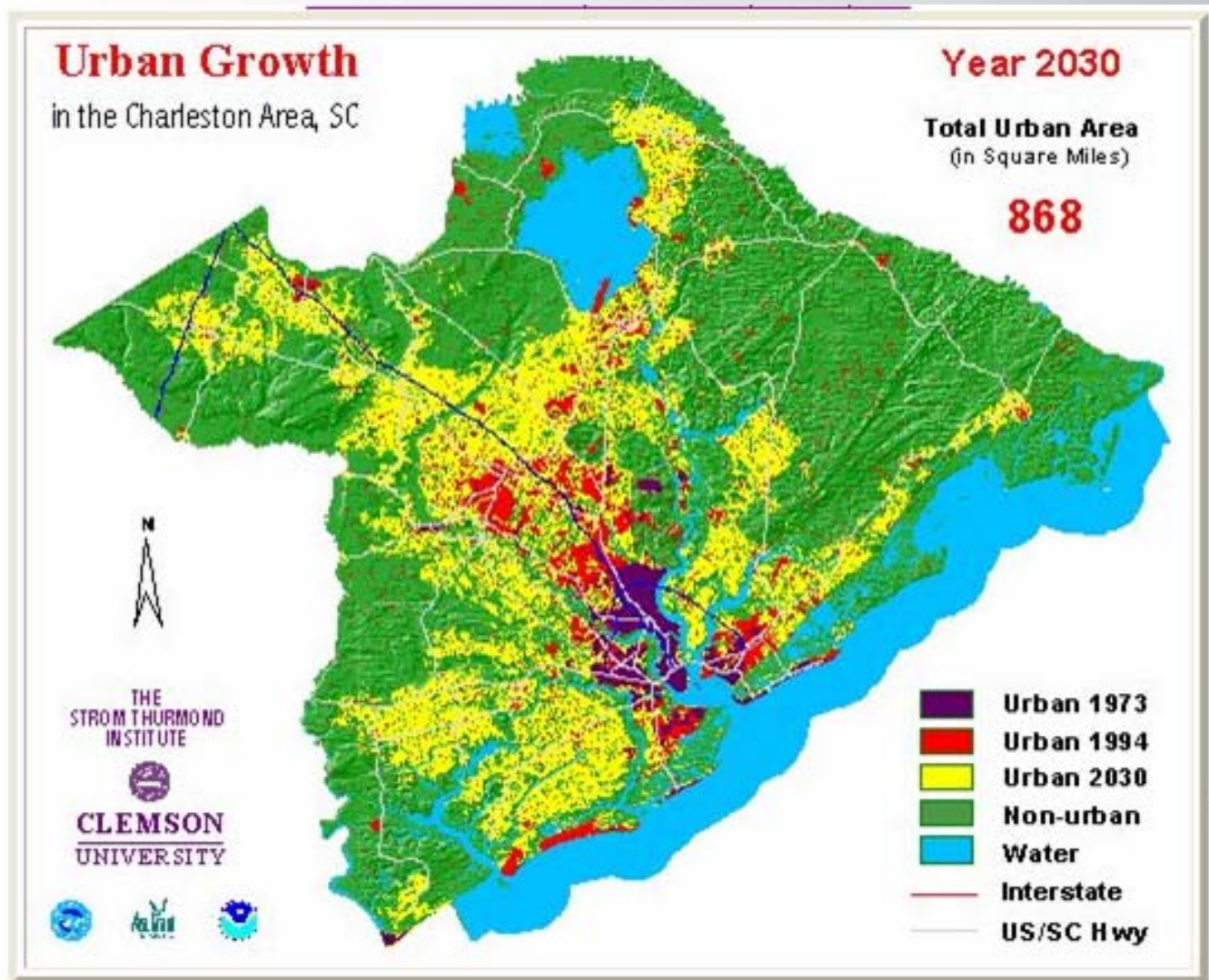


Acknowledgements



- DHEC
- Dept of Commerce
- Dept of Natural Resources
- Budget and Control Board
 - Division of Research and Statistical Services
- S.C. Employment Security Commission
- USC – Moore School of Business
 - Division of Research
- Clemson - Jim Self Center on the Future
- Strom Thurmond Institute of Government and Public Affairs
- Bureau of Census , Bureau of Labor Statistics, National Center for Educational Statistics

Strom Thurmond Urban Growth Model





The **Jim Self Center** *on the Future*



ECONOMIC AND SOCIAL WELL-BEING INDEX

COUNTY RANKINGS

(** Click on linked column titles to obtain more information about each. **)

COUNTY	VARIABLES FOR COUNTY RANKINGS					TOTAL RANK
	<u>INCOME & EMPLOYMENT</u>	<u>HEALTH & SOCIAL CONDITIONS</u>	<u>BUSINESS ACTIVITY</u>	<u>HUMAN CAPITAL</u>	<u>PHYSICAL ENVIRONMENTAL CONDITIONS</u>	
	Rank	Rank	Rank	Rank	Rank	
Abbeville	21	25	25	33	5	15
Aiken	12	19	18	5	37	12
Allendale	46	4	42	42	1	37
Anderson	2	20	5	13	39	6
Bamberg	42	13	45	37	2	35
Barnwell	18	22	38	29	26	26
Beaufort	1	30	19	1	31	3
Berkeley	27	10	4	20	43	16
Calhoun	25	1	33	18	3	7

Trends



- *S.C. will have a 28% increase in population between 2000 and 2030*
- *The proportion 65 and older will increase from 12.1 % to 22%*
- *Average County Increase in Median School Years completed increased from 7.1 to 12.7 years between 1950 and 2000*
- *Between 2001 and 2013 public school enrollment will increase by .9 % while High School graduates will increase by 16.9%*
- *More than 500,000 people in S.C. live in poverty and more than 1 of every 5 child under 5 years*
- *In 2000 2.4% of S.C. population was Hispanic (U.S. = 12.5%)*
 - *However, 7.3% of births in 2003 were to Hispanic Mothers*
- *4.8% of all births in 2003 were to mothers under 17*
- *17.1 % of all births were to unwed mothers*

Trends

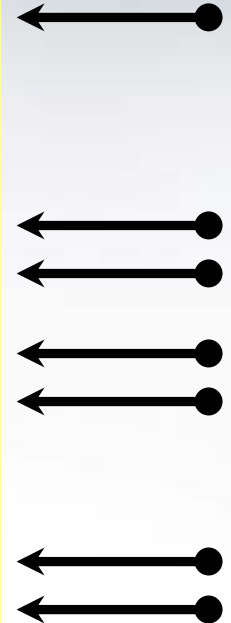


- *S.C. Lost about 100,000 manufacturing jobs in last decade*
 - *Lost 52,000 in Textiles (Only 40,400 jobs left)*
 - *Lost 33,000 in Apparel (Only 5,300 jobs left)*
- *S.C. Lost 53,000 manufacturing jobs in last decade to off shoring*
- *Employment in manufacturing will decline from 17.5% to 14.84 % between 2000 and 2010 – a loss of 8,625 jobs*
- *Service sector will be 40% of the employment in 2010*
- *S.C. will gain 141,140 jobs in next decade*
 - *However top categories low wage (Retail, Food Prep, Cashiers, Waiters)*
 - *S.C. will employ about 6,000 new teachers in 2012*
- *Per Capita income in S.C. Is 87% of the national average*
- *S.C. Wage rates consistently lower than N.C. and Georgia*

Census Data S.C. versus the U.S



State & County QuickFacts		
People QuickFacts	South Carolina	USA
Population, 2003 estimate	4,147,152	290,809,777
Population, percent change, April 1, 2000 to July 1, 2003	3.40%	3.30%
Population, 2000	4,012,012	281,421,906
Population, percent change, 1990 to 2000	15.10%	13.10%
Persons under 5 years old, percent, 2000	6.60%	6.80%
Persons under 18 years old, percent, 2000	25.20%	25.70%
Persons 65 years old and over, percent, 2000	12.10%	12.40%
White persons, percent, 2000 (a)	67.20%	75.10%
Black or African American persons, percent, 2000 (a)	29.50%	12.30%
Asian persons, percent, 2000 (a)	0.90%	3.60%
White persons, not of Hispanic/Latino origin, percent, 2000	66.10%	69.10%
Persons of Hispanic or Latino origin, percent, 2000 (b)	2.40%	12.50%
Foreign born persons, percent, 2000	2.90%	11.10%
Language other than English spoken at home, pct age 5+, 2000	5.20%	17.90%
High school graduates, percent of persons age 25+, 2000	76.30%	80.40%
Bachelor's degree or higher, pct of persons age 25+, 2000	20.40%	24.40%
Homeownership rate, 2000	72.20%	66.20%
Housing units in multi-unit structures, percent, 2000	15.80%	26.40%
Median value of owner-occupied housing units, 2000	\$94,900	\$119,600
Median household income, 1999	\$37,082	\$41,994
Per capita money income, 1999	\$18,795	\$21,587
Persons below poverty, percent, 1999	14.10%	12.40%
Private nonfarm employment, percent change 2000-2001	-0.30%	0.90%
Retail sales per capita, 1997	\$8,874	\$9,190
Minority-owned firms, percent of total, 1997	11.80%	14.60%
Women-owned firms, percent of total, 1997	24.70%	26.00%

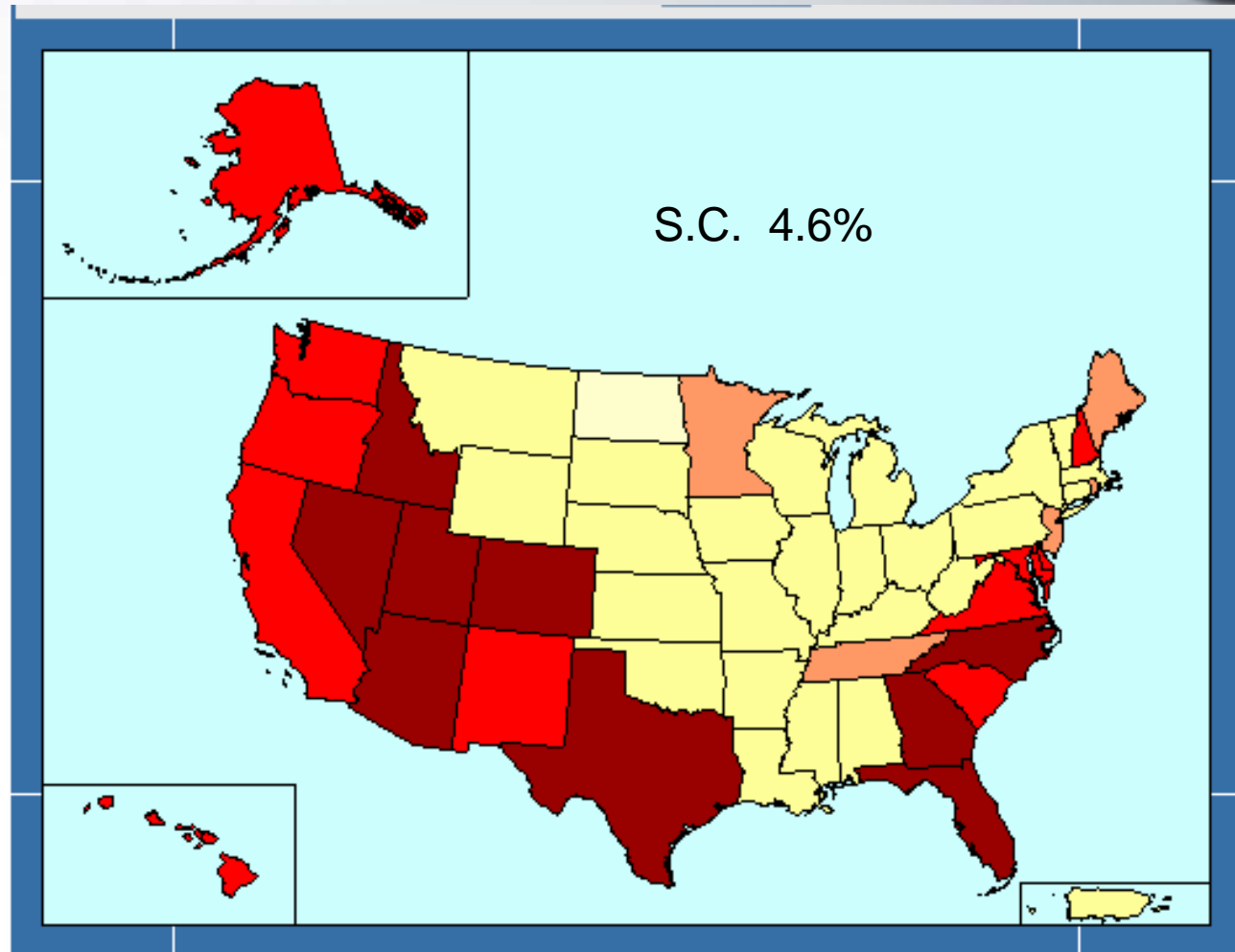
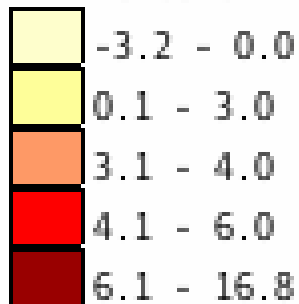


State Population Changes 2000 - 2004



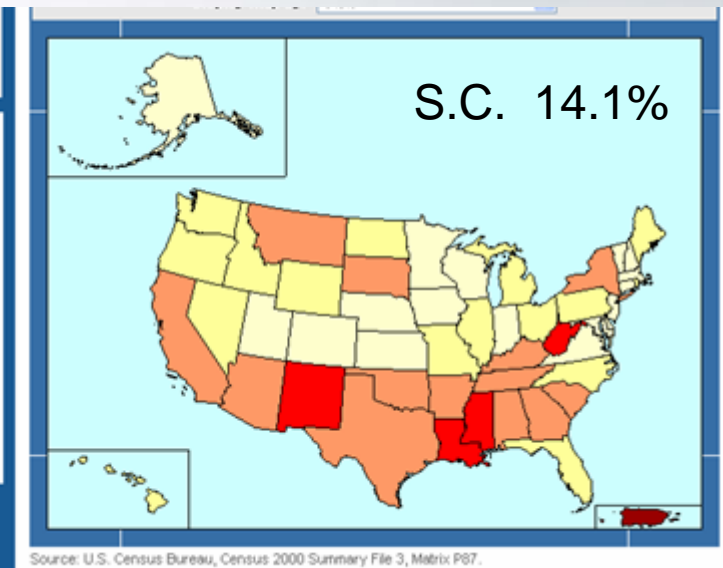
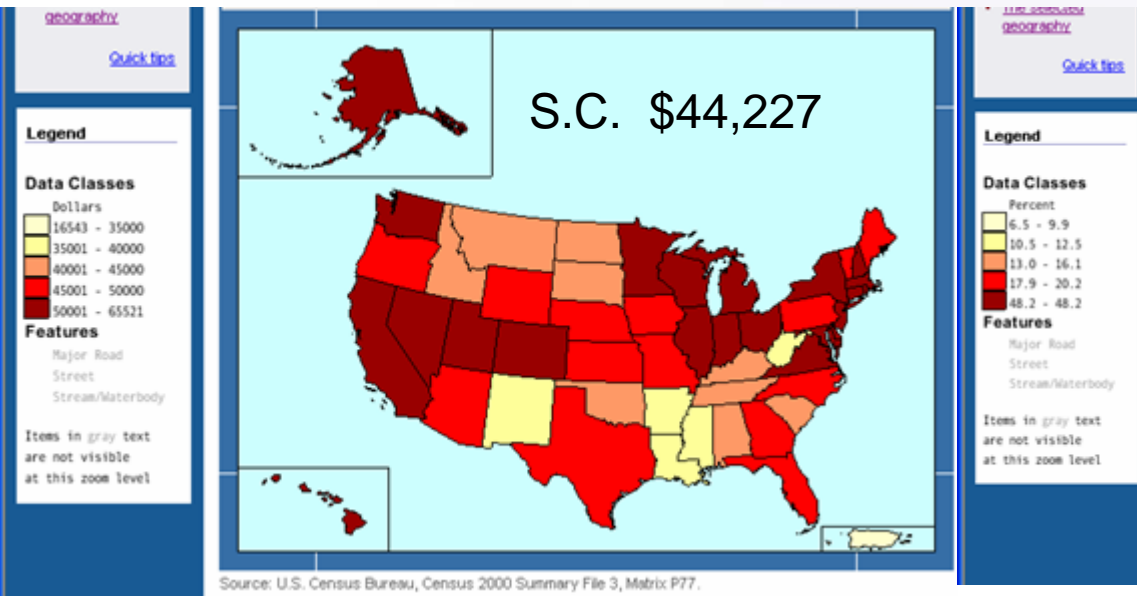
Data Classes

Percent

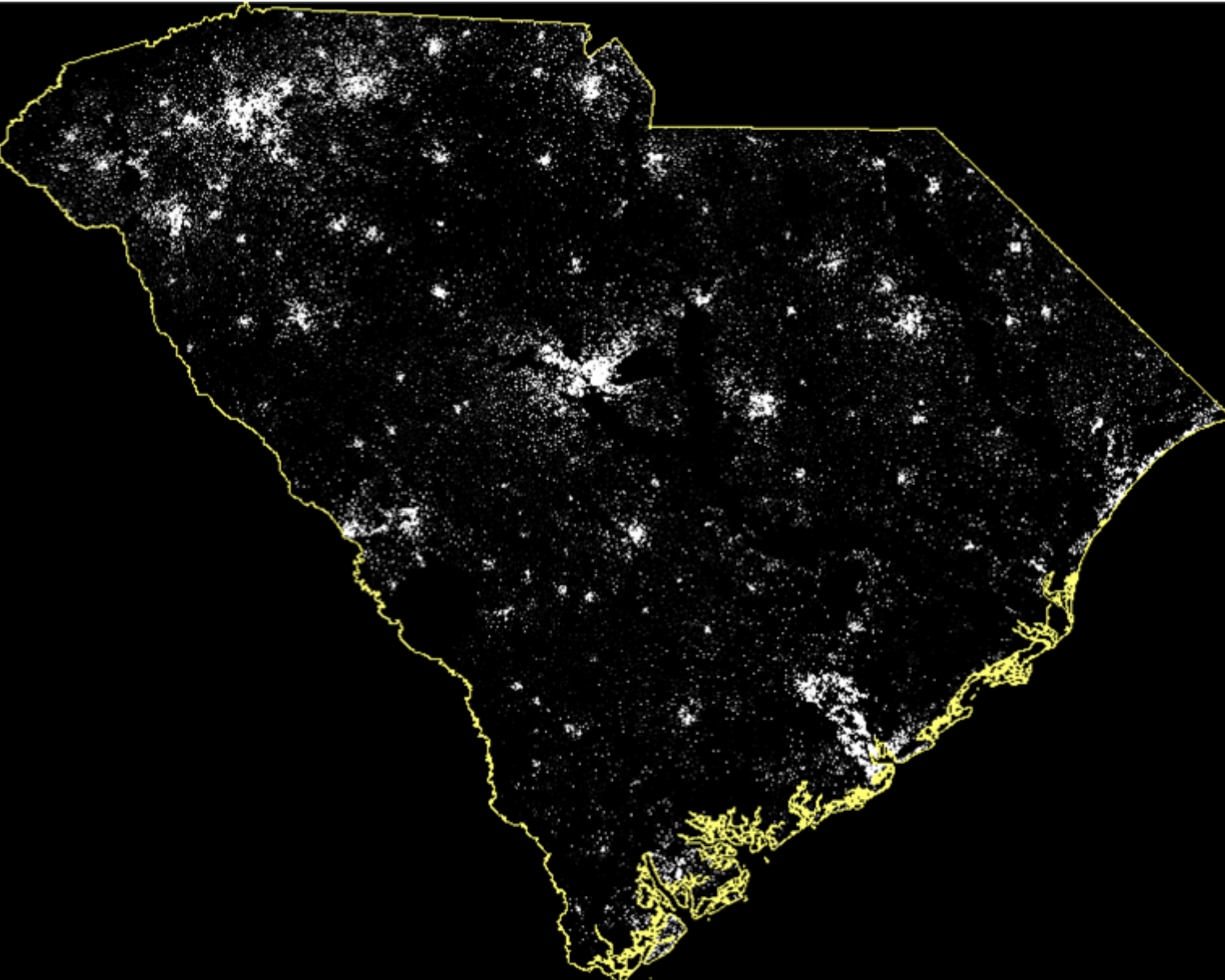


Source: US Census Bureau, Population Estimates Program

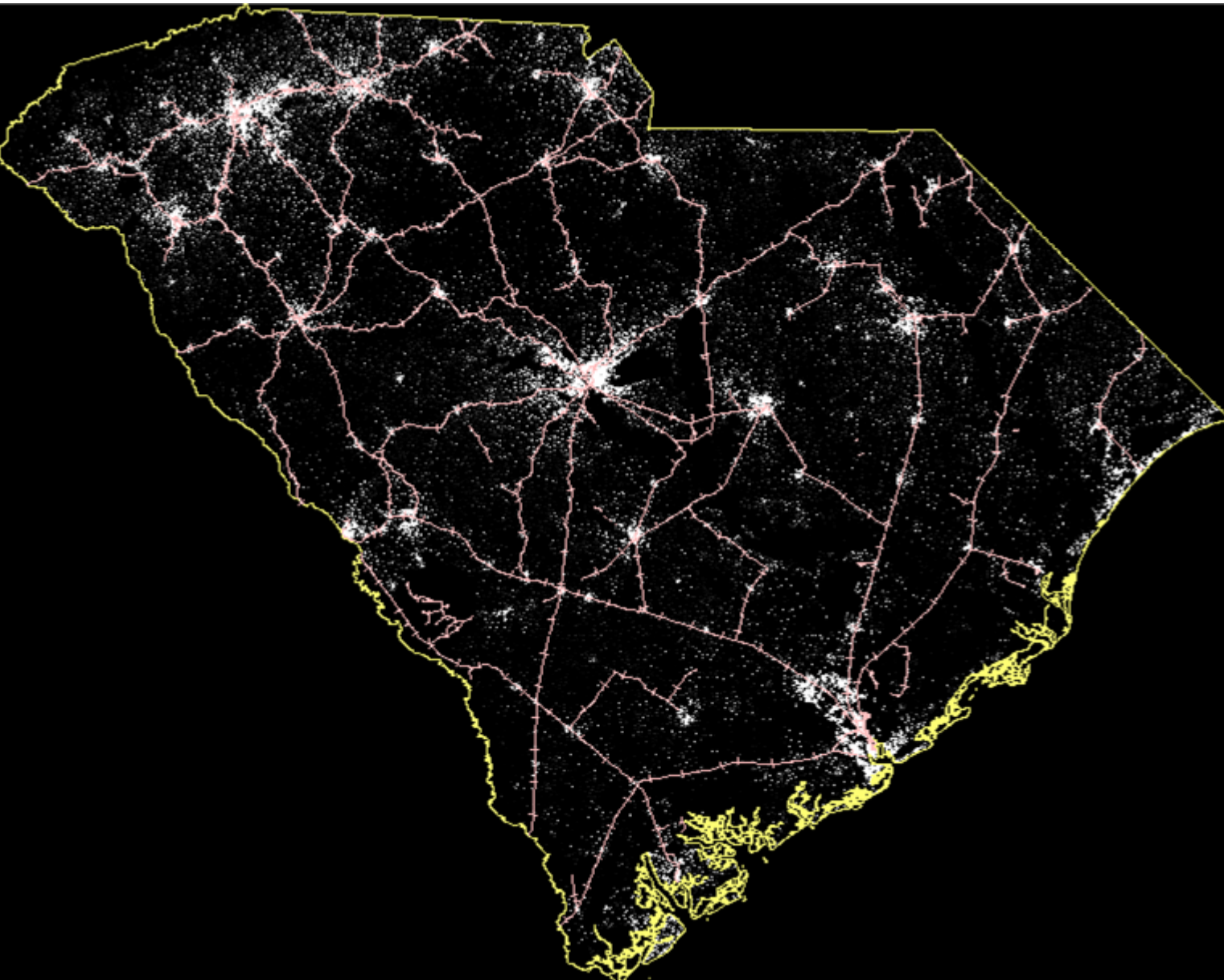
U.S. Median Family Income 1999 and % Below Poverty



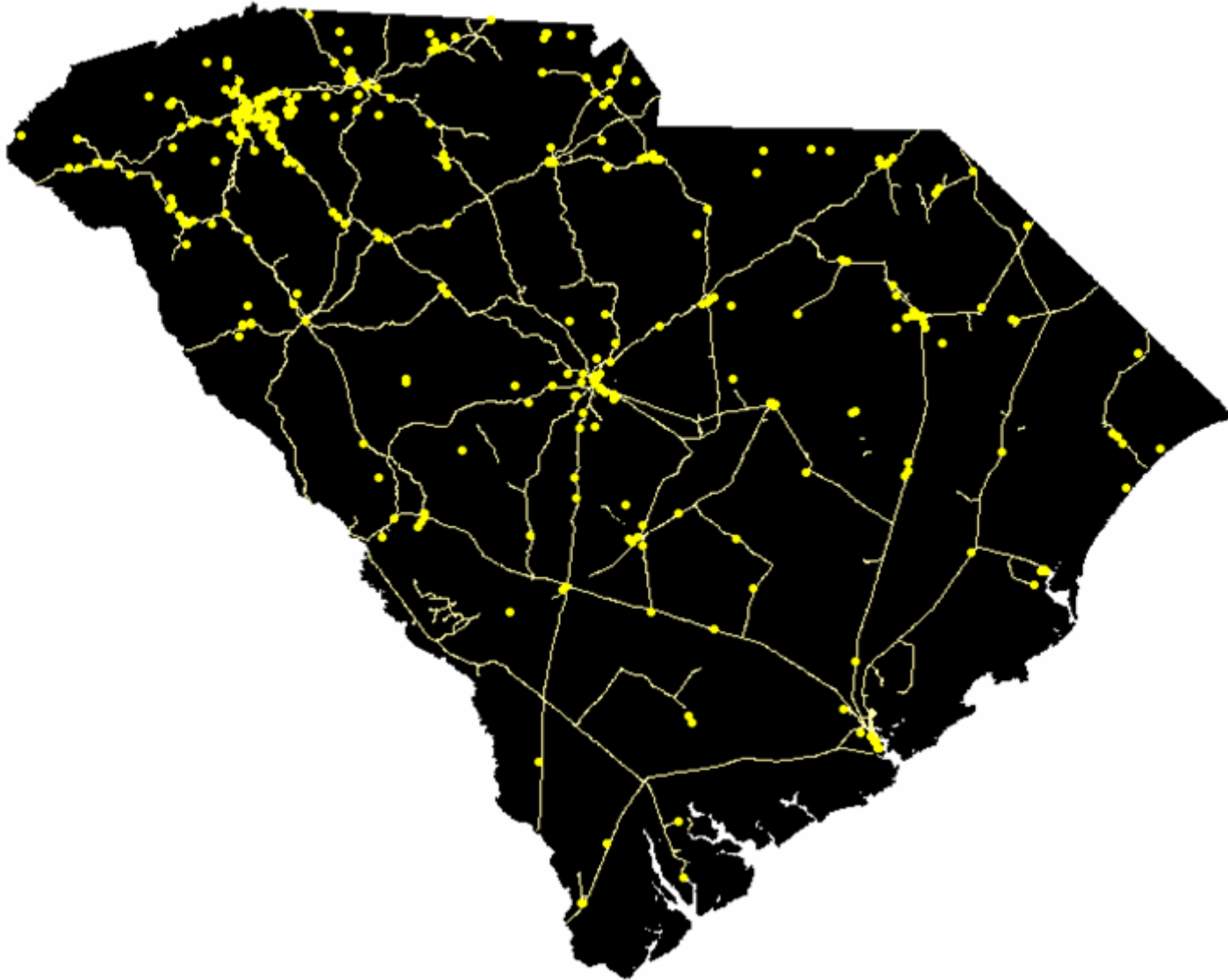
Population Density



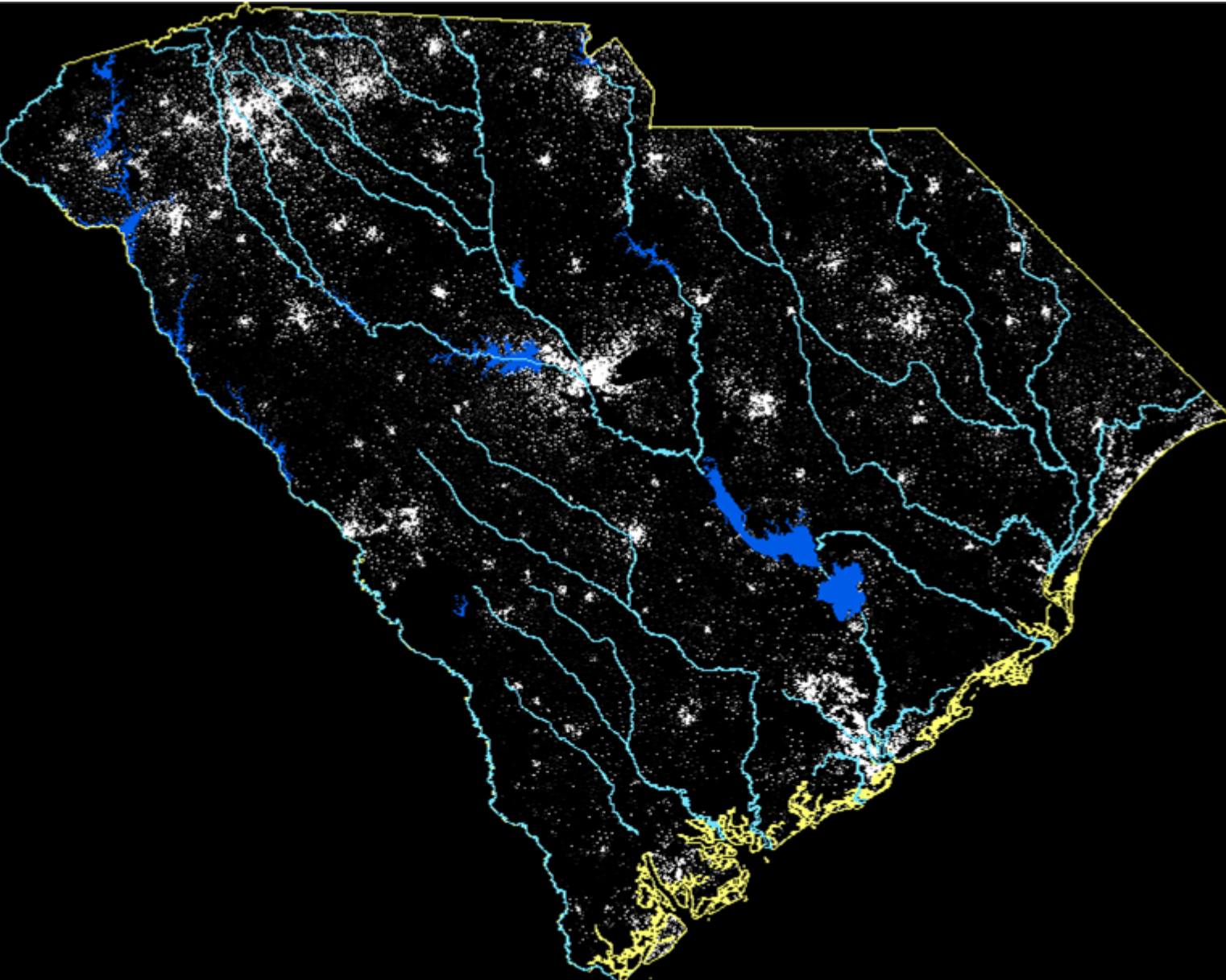
Railroads



Pre 1900 Industries & Railroads



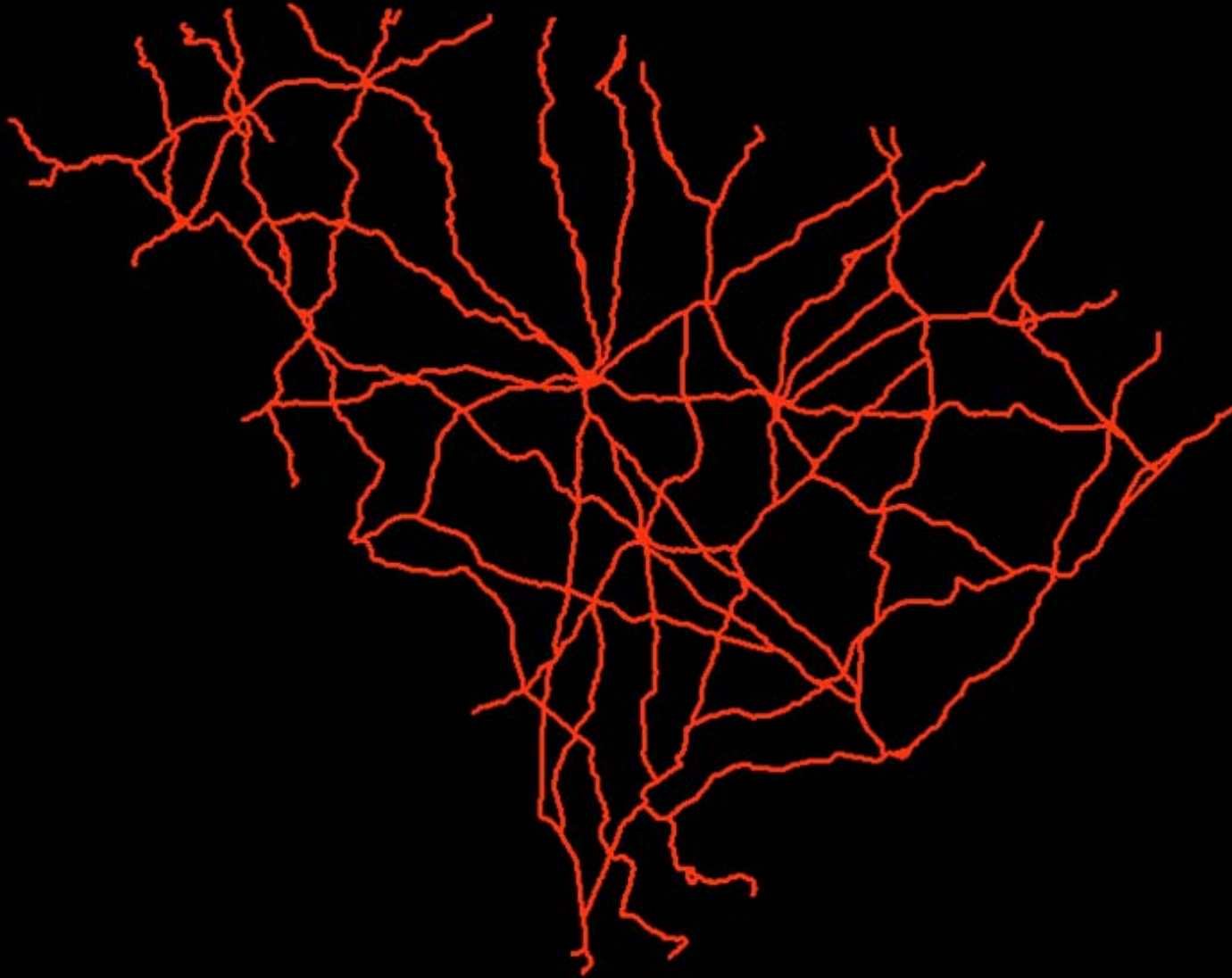
Lakes and Rivers



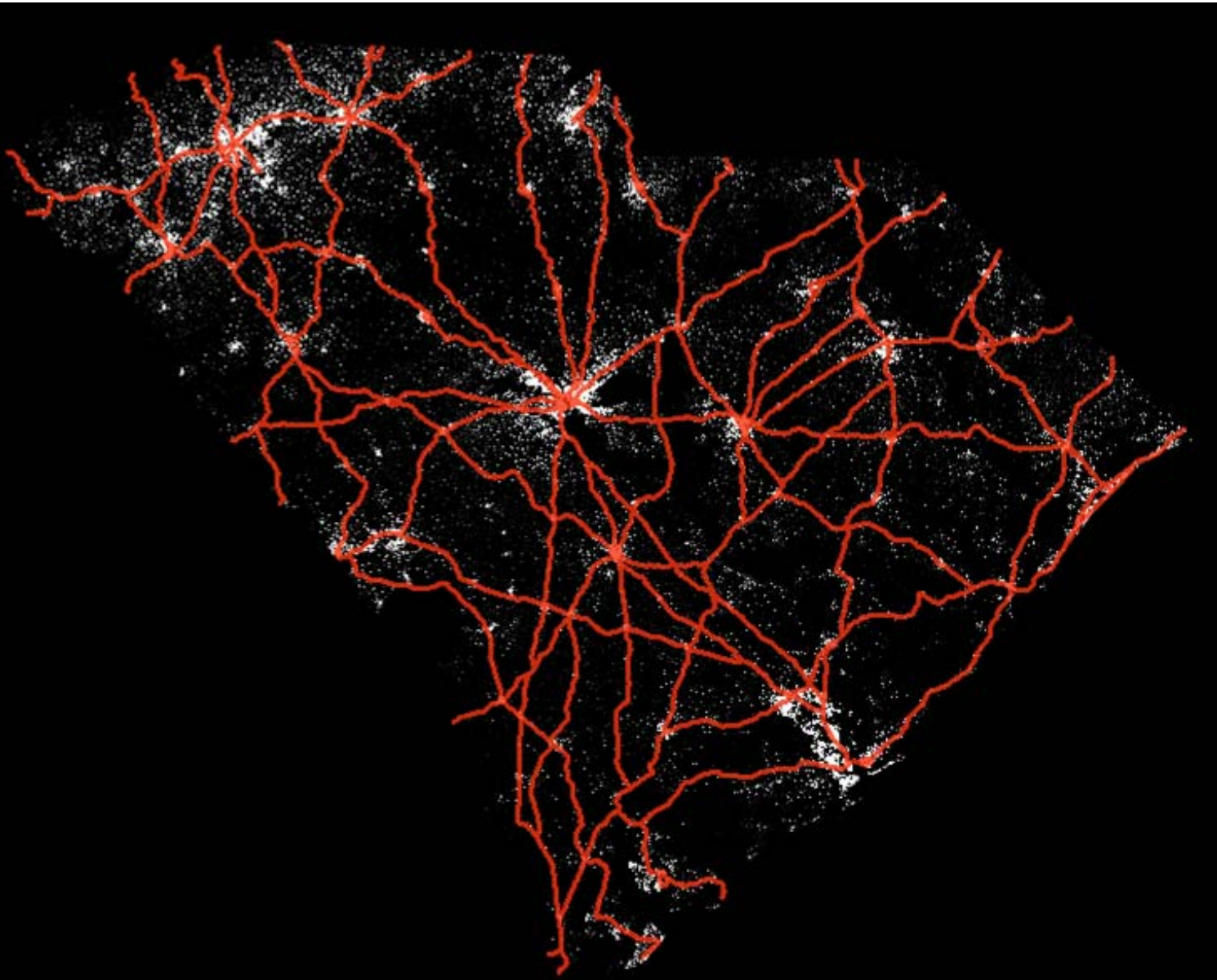
State Highways



US Highways



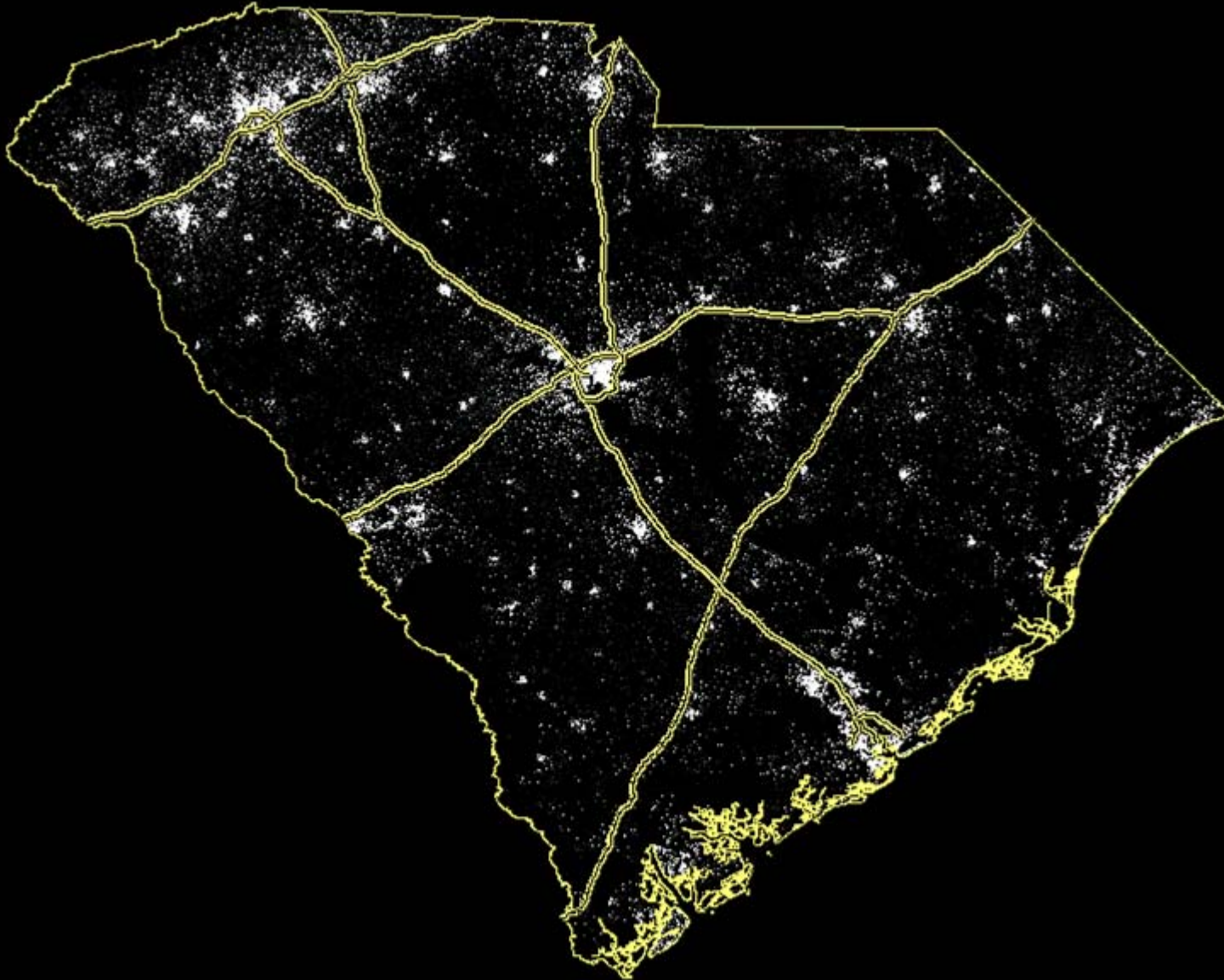
US Highways and Population



Interstates



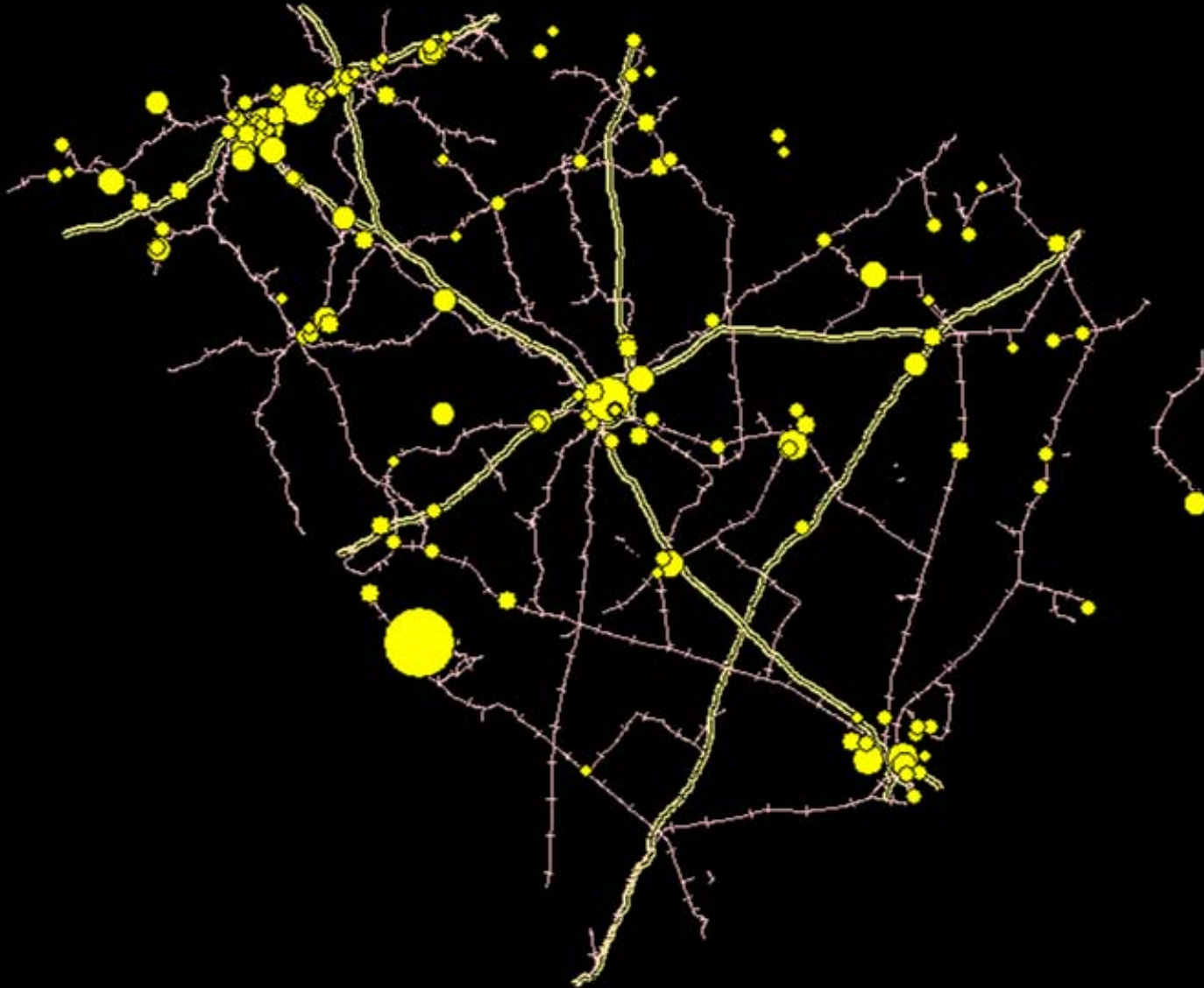
Interstate Highways and Population



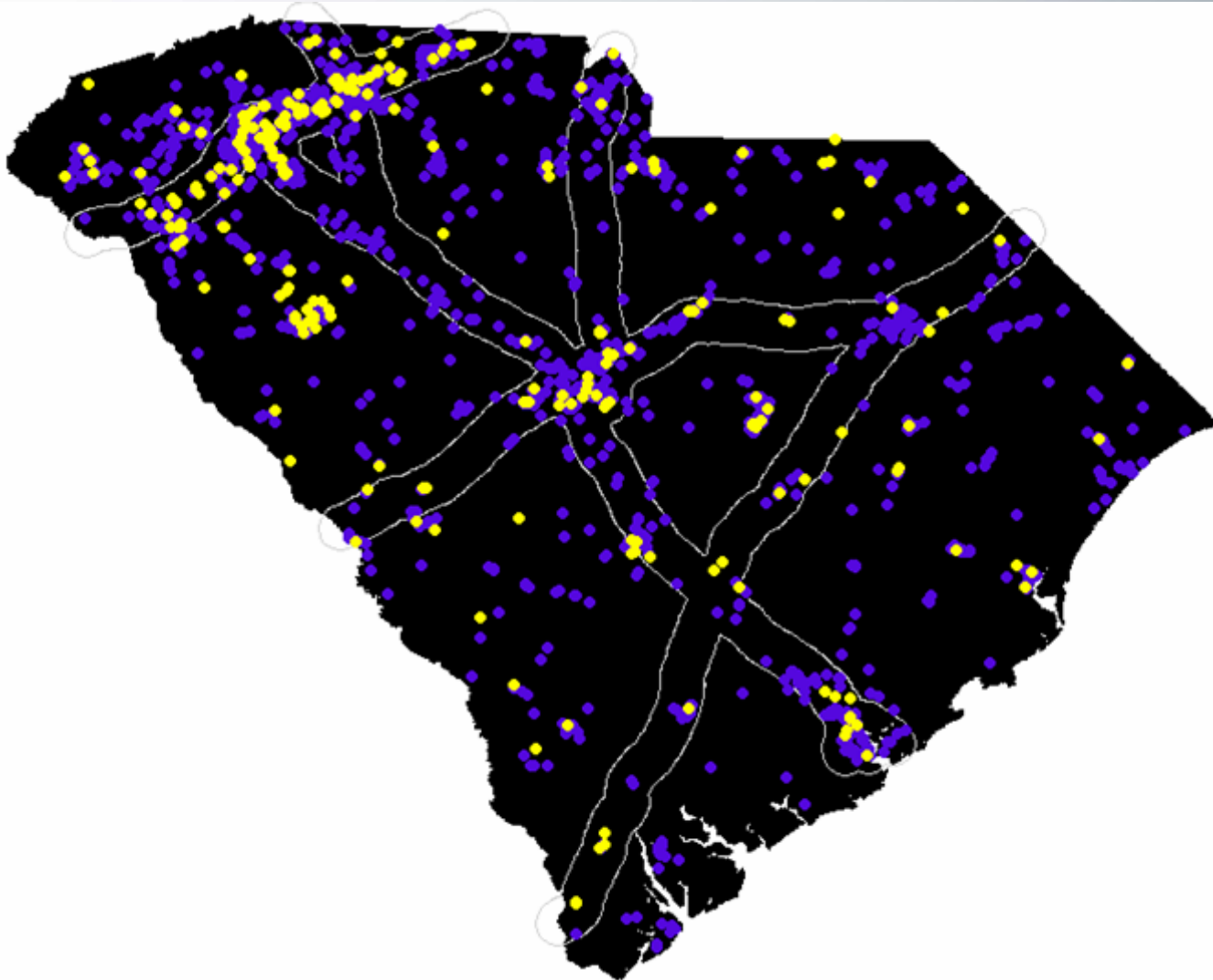
Interstates and Railroads



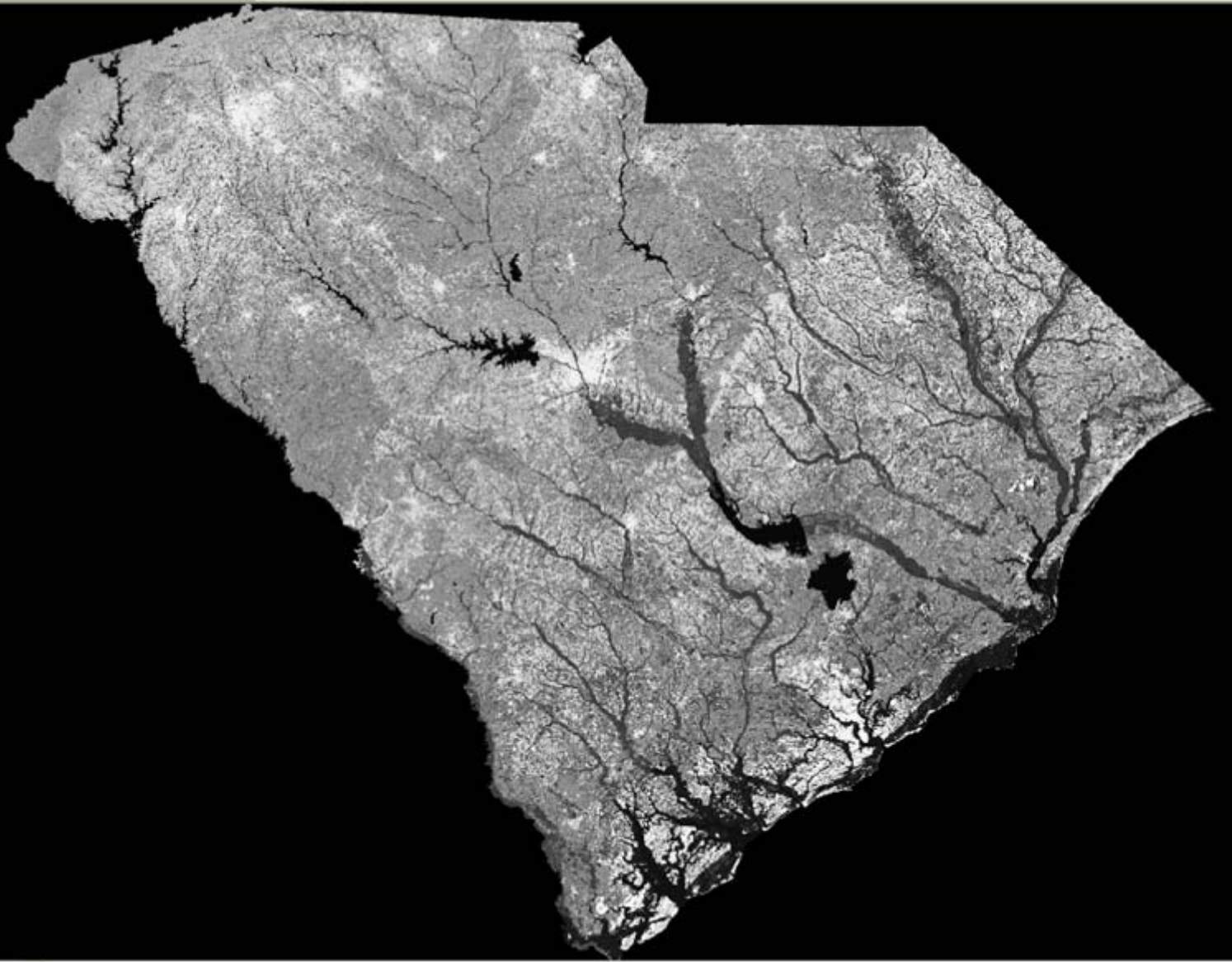
Major Employers



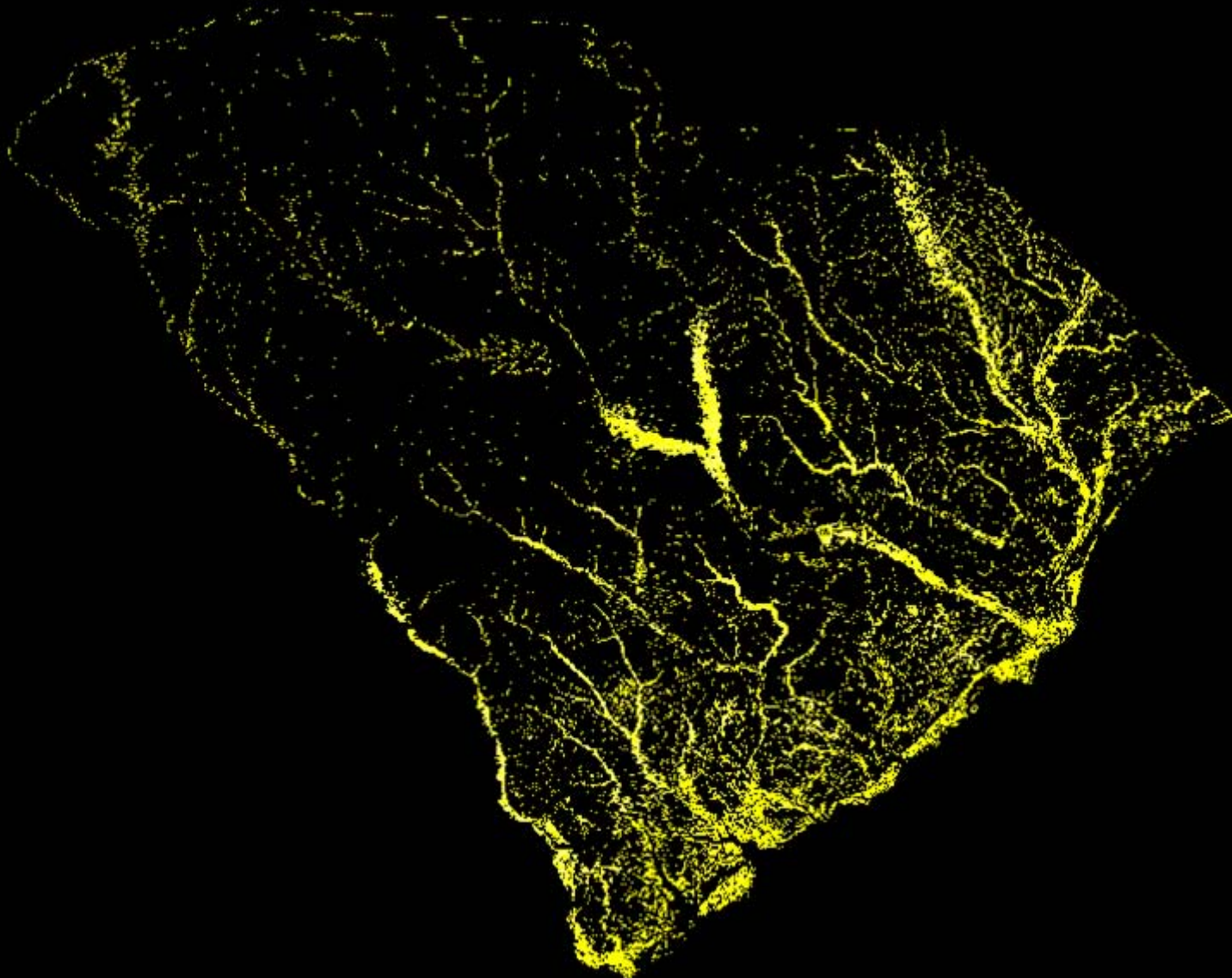
Since 1970 & Since 1990



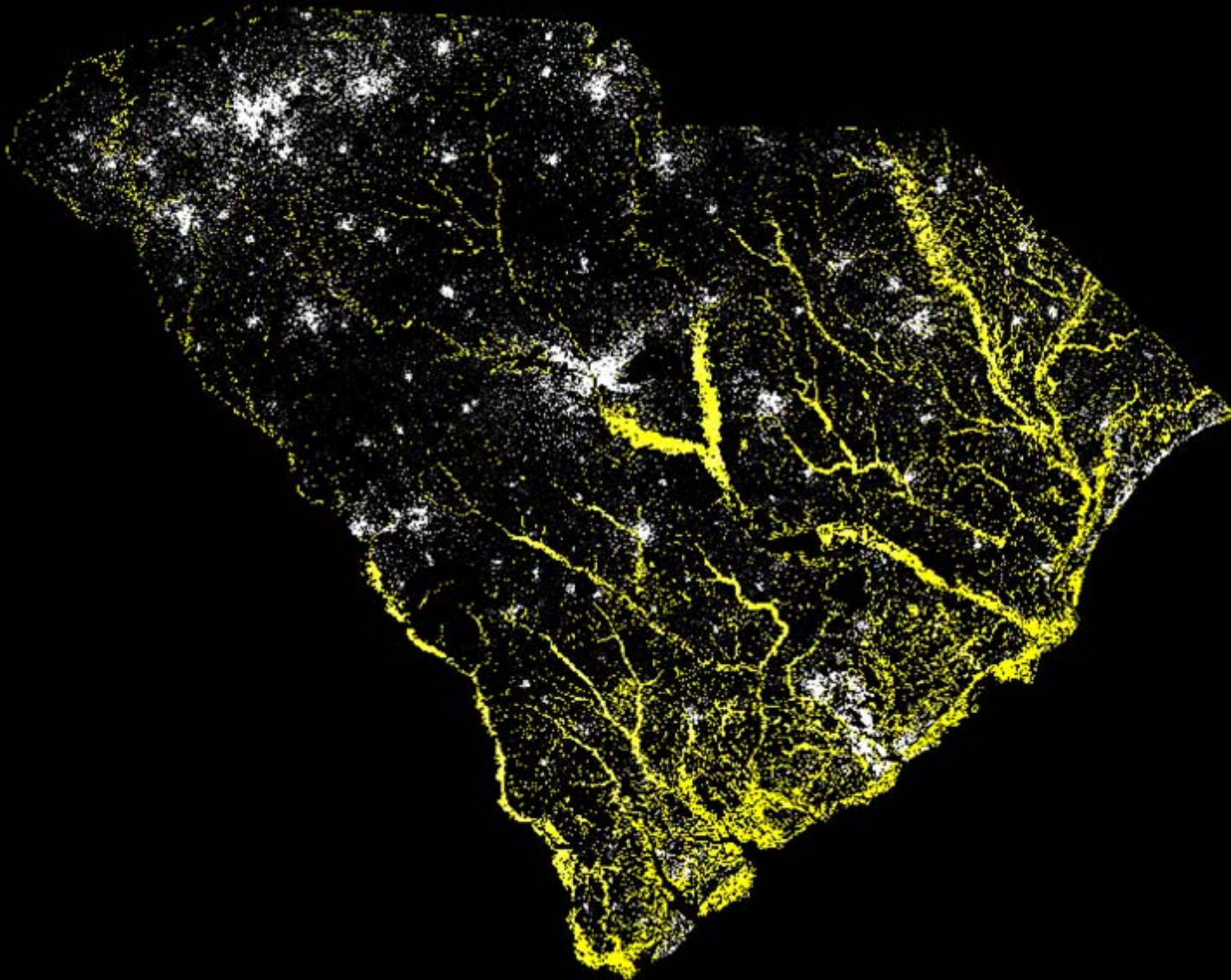
Land Cover



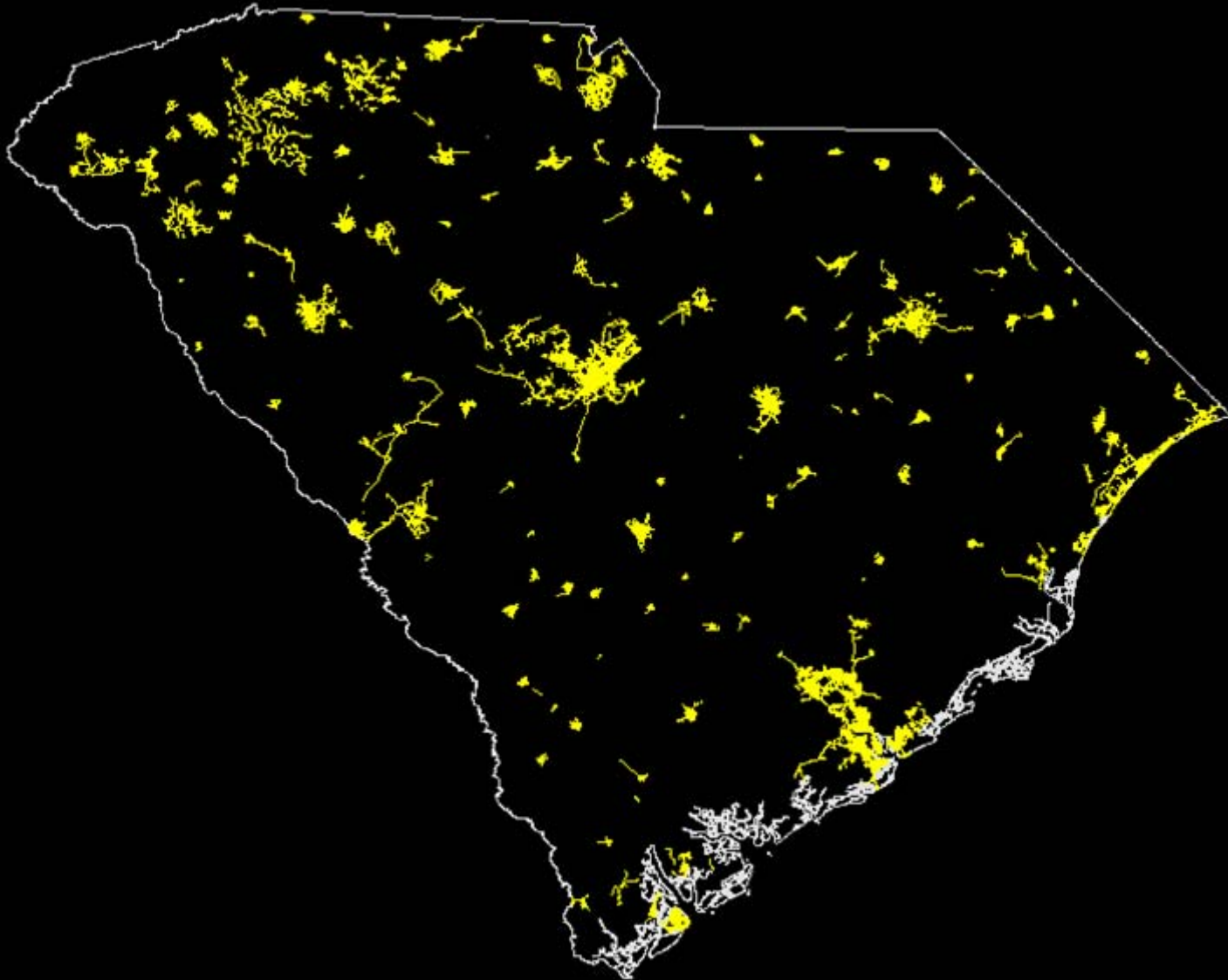
Wetlands



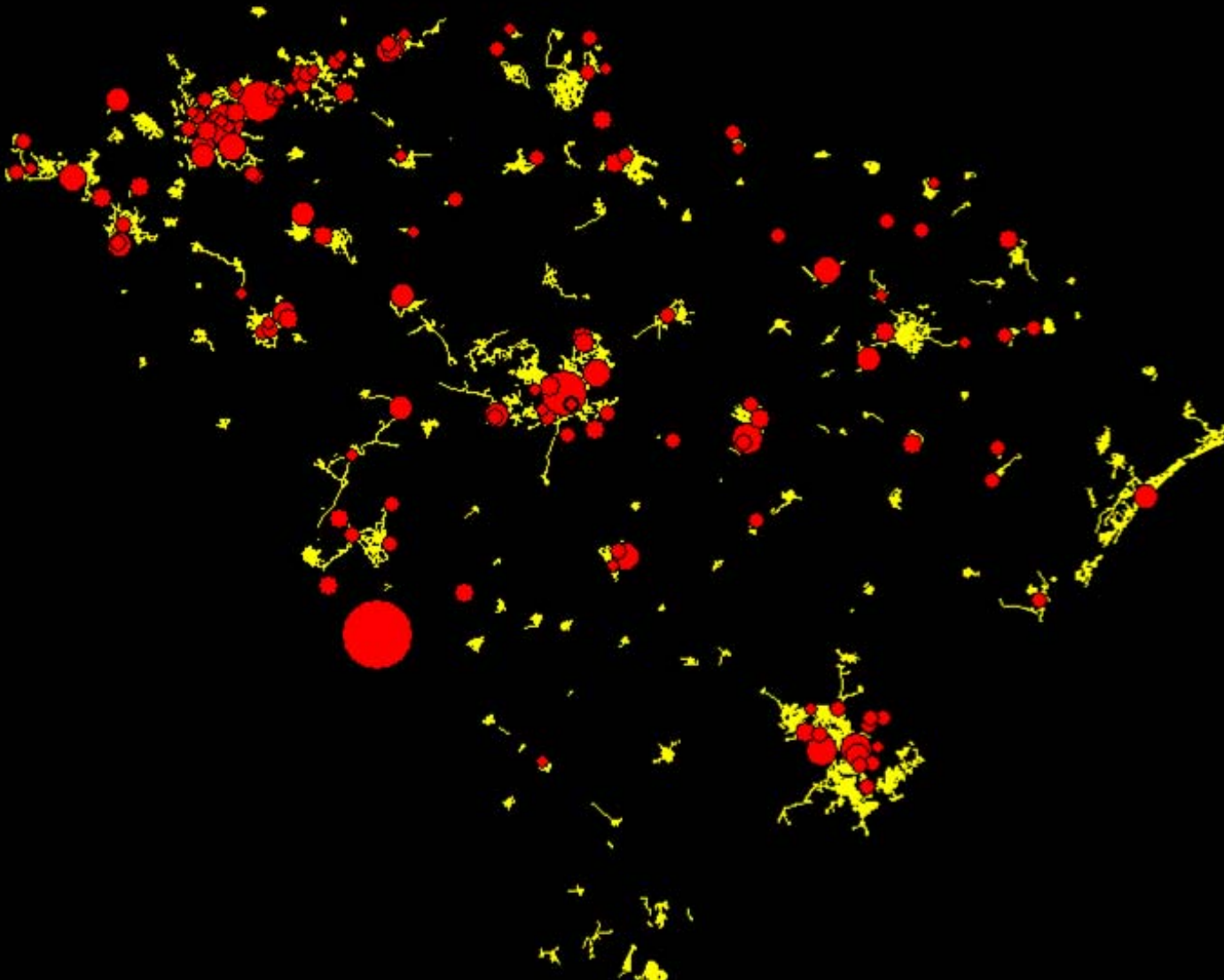
Wetlands and Population



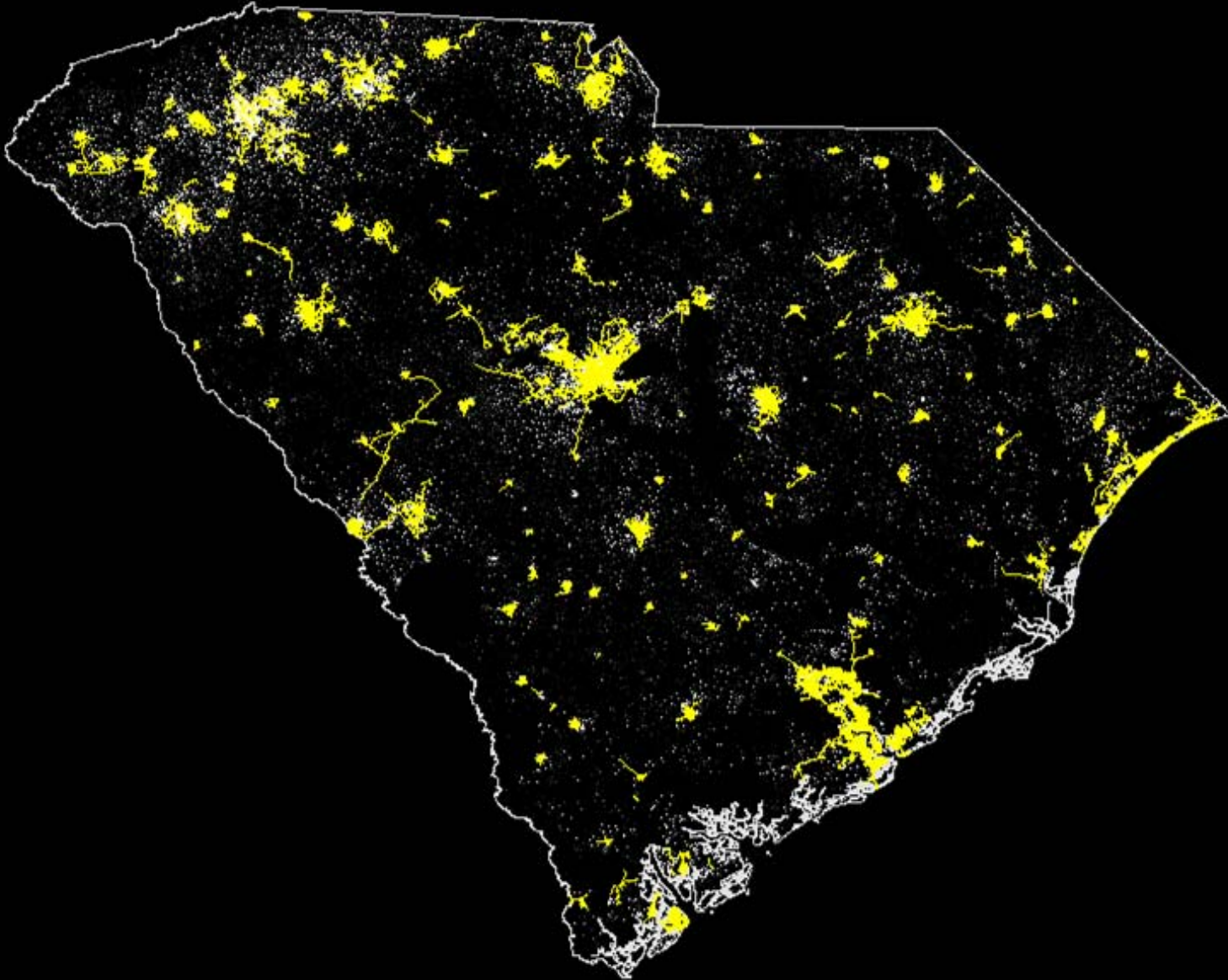
Sewer Lines



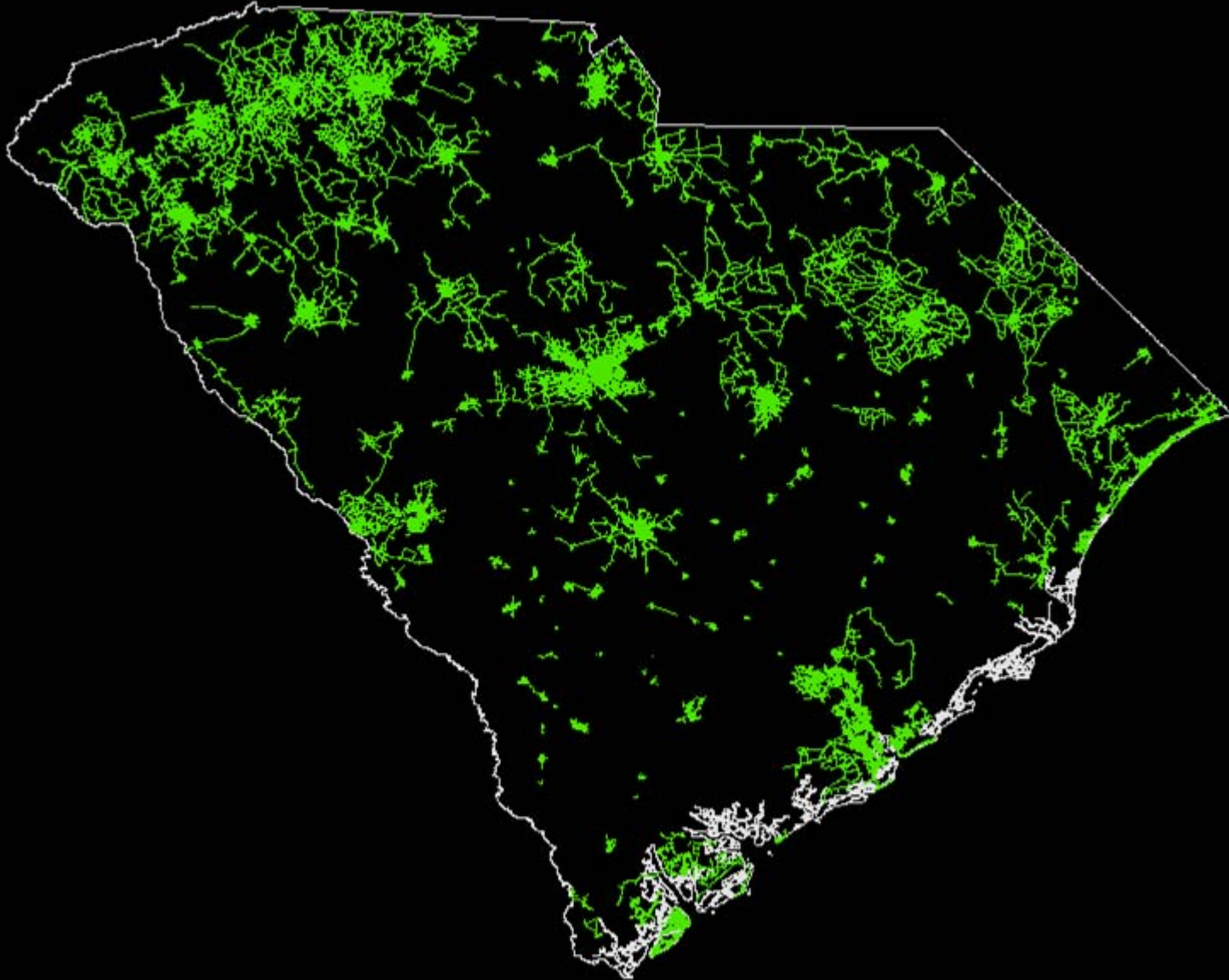
Sewer Lines and Major Employers



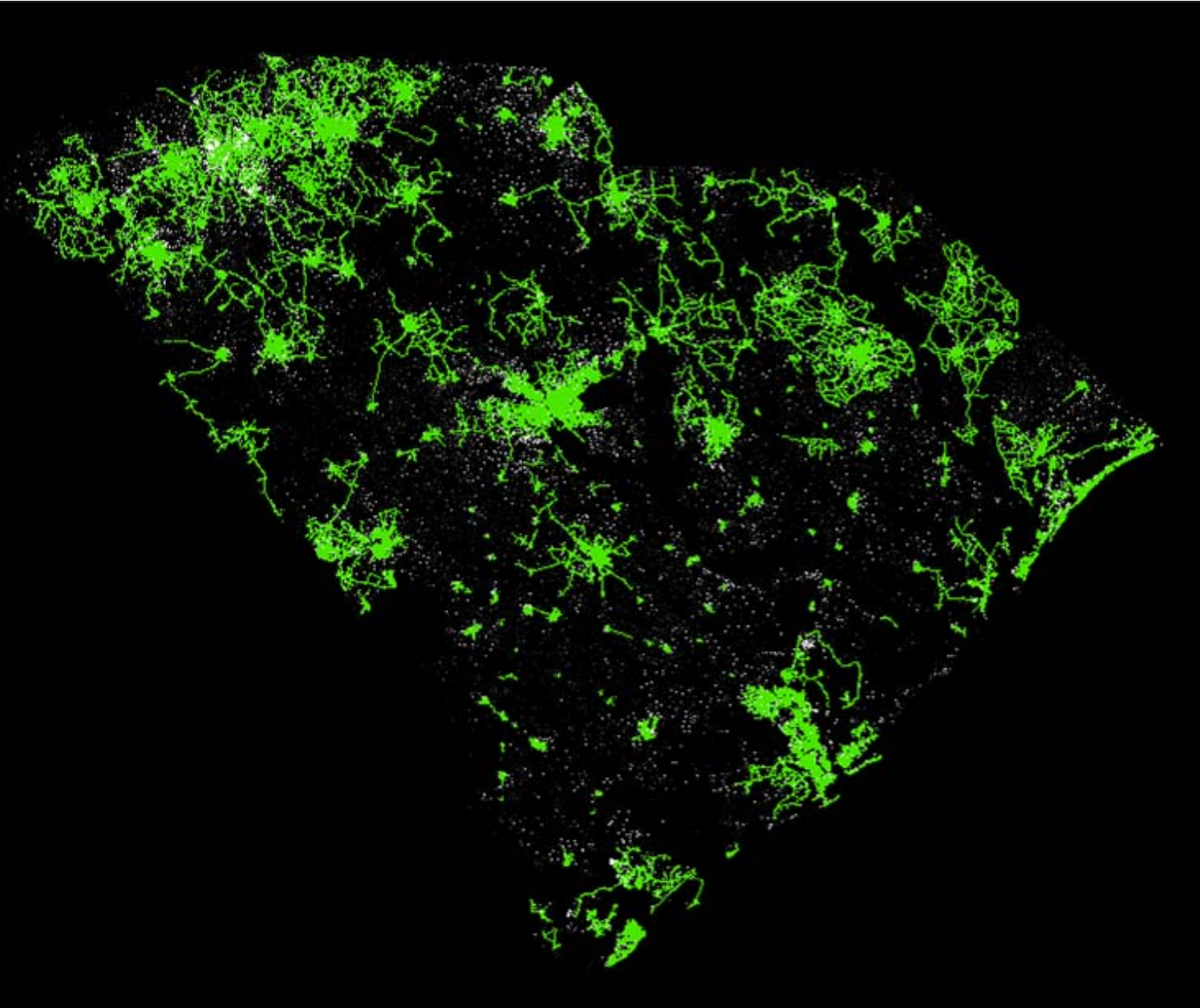
Sewer Lines and Population



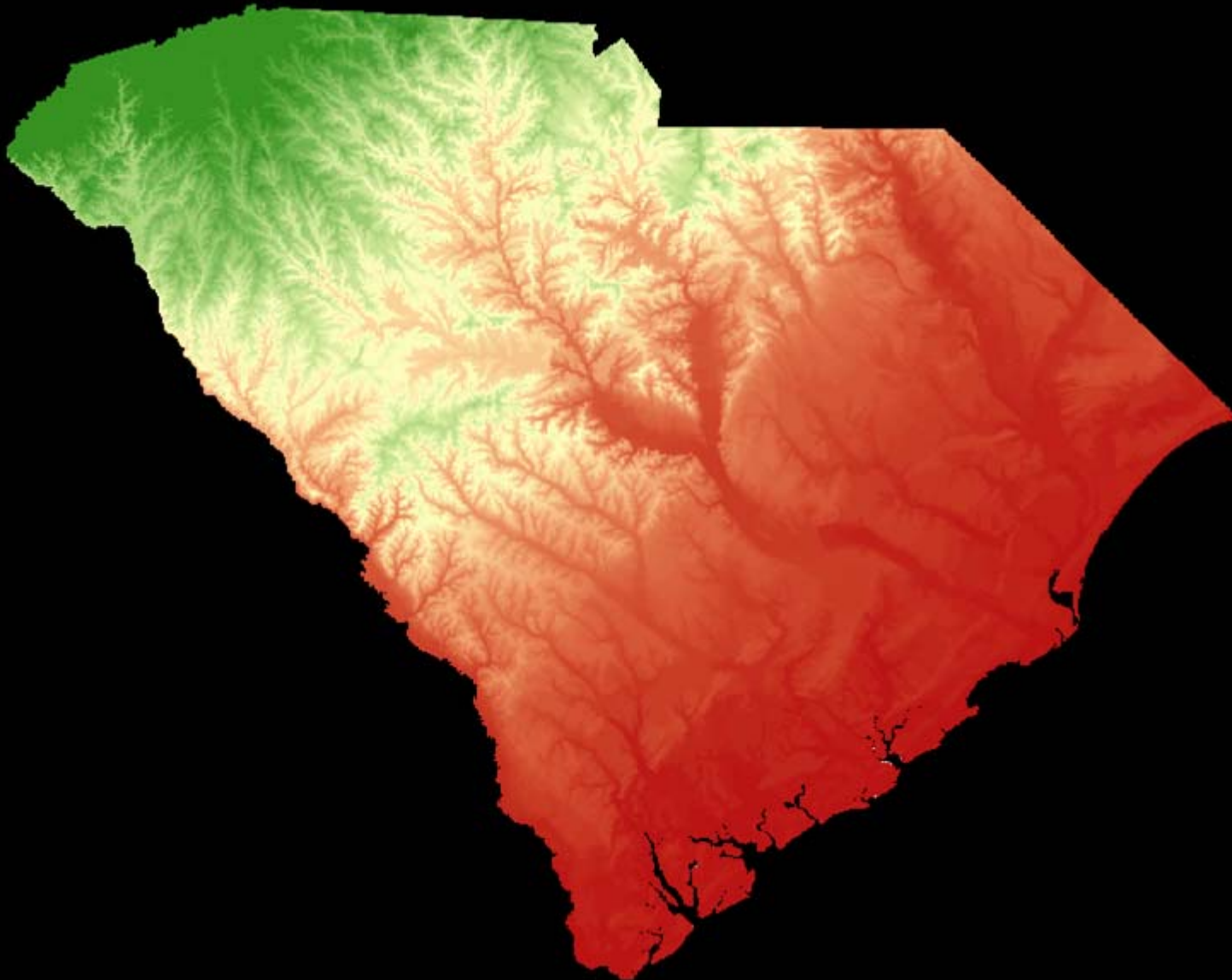
Water Lines



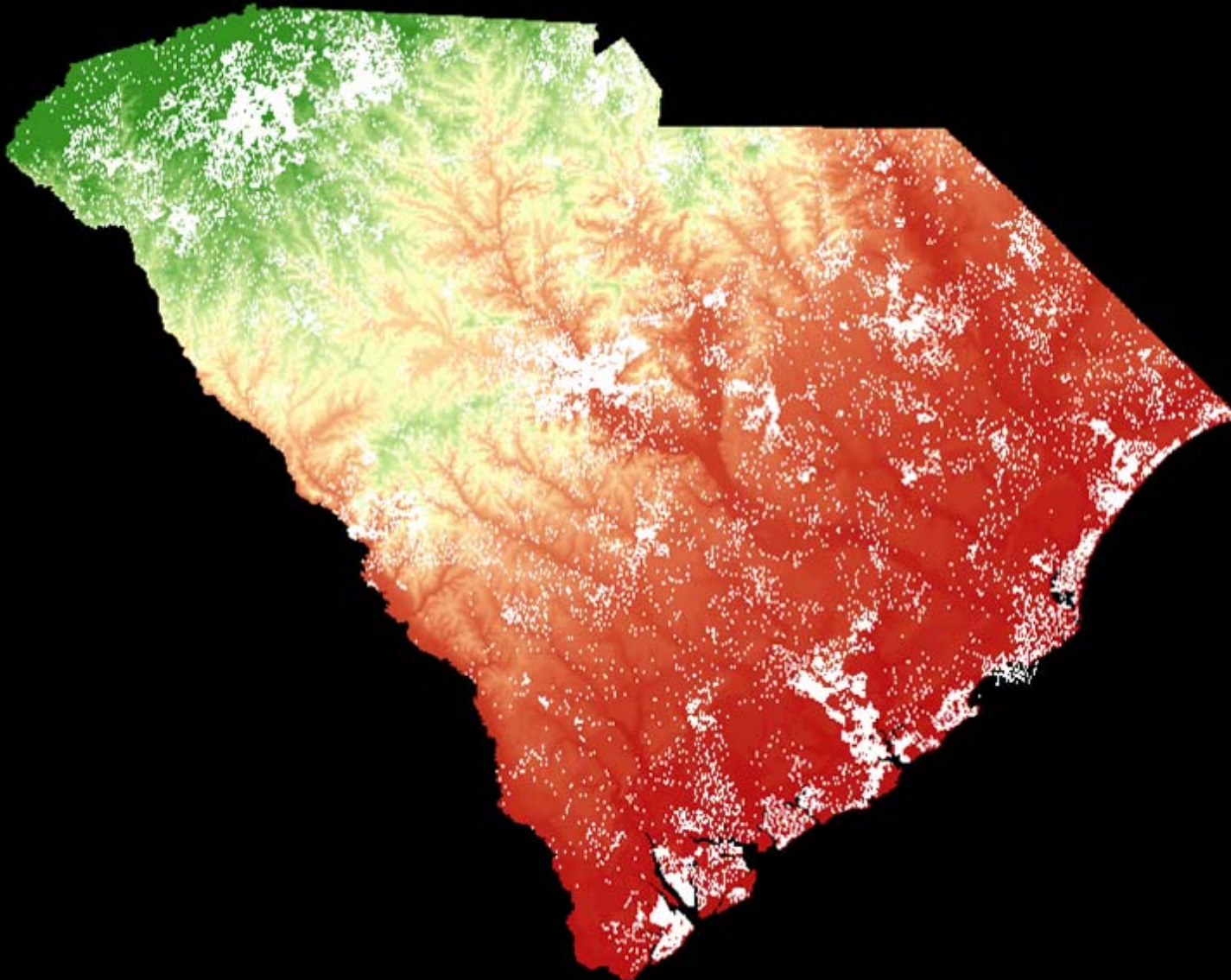
Water Lines and Population



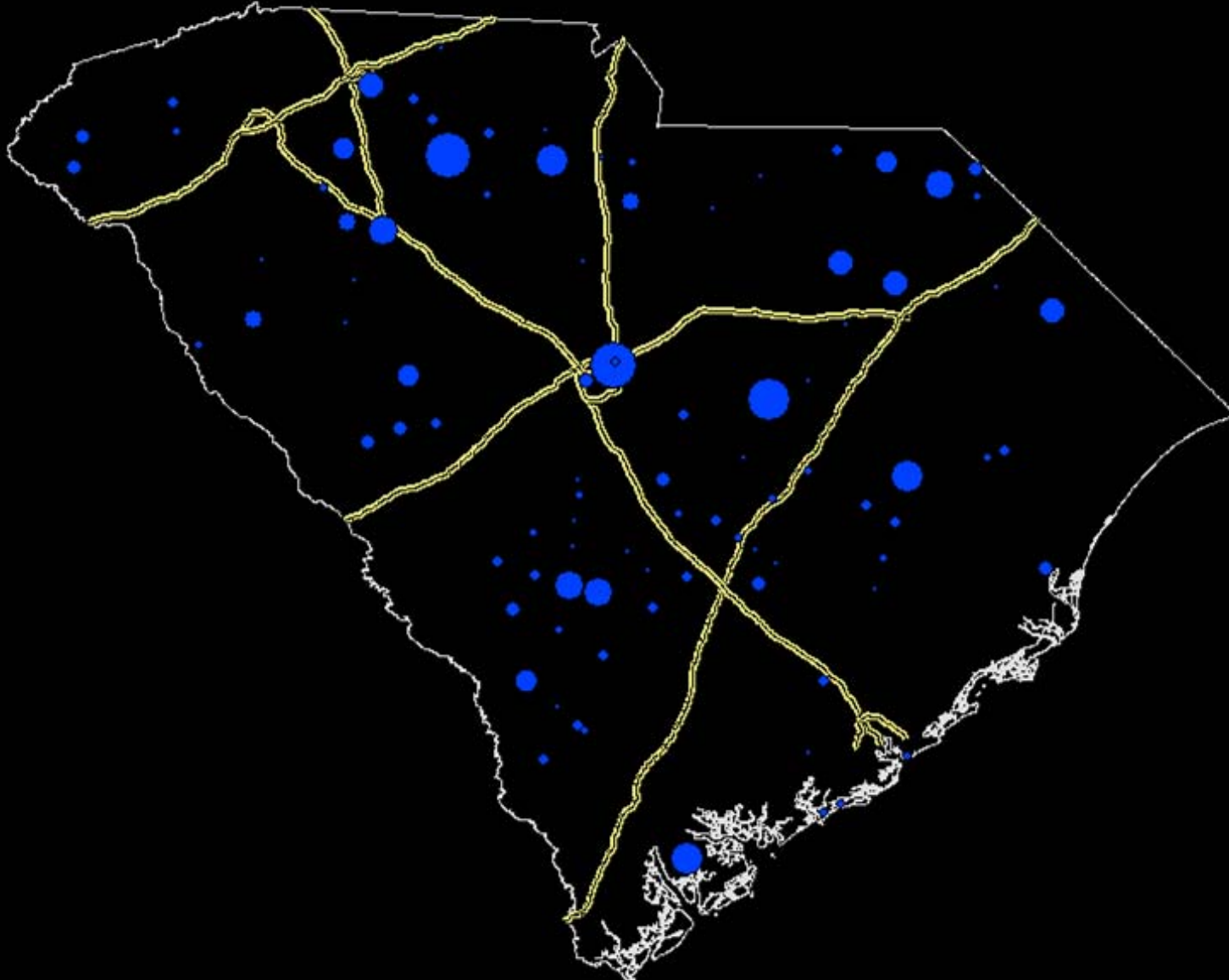
Elevation



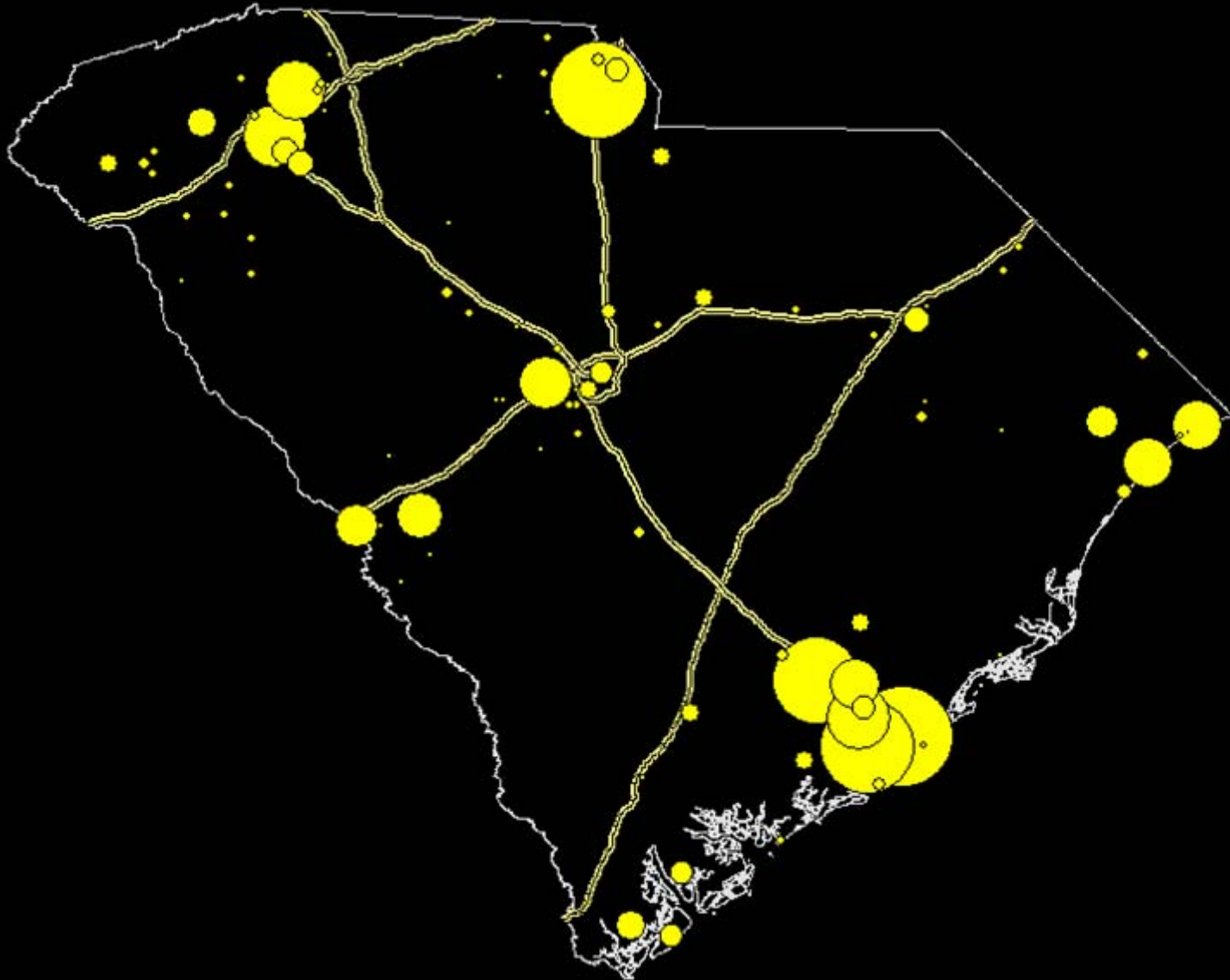
Elevation and Population



Places that Lost Population 2000 - 04



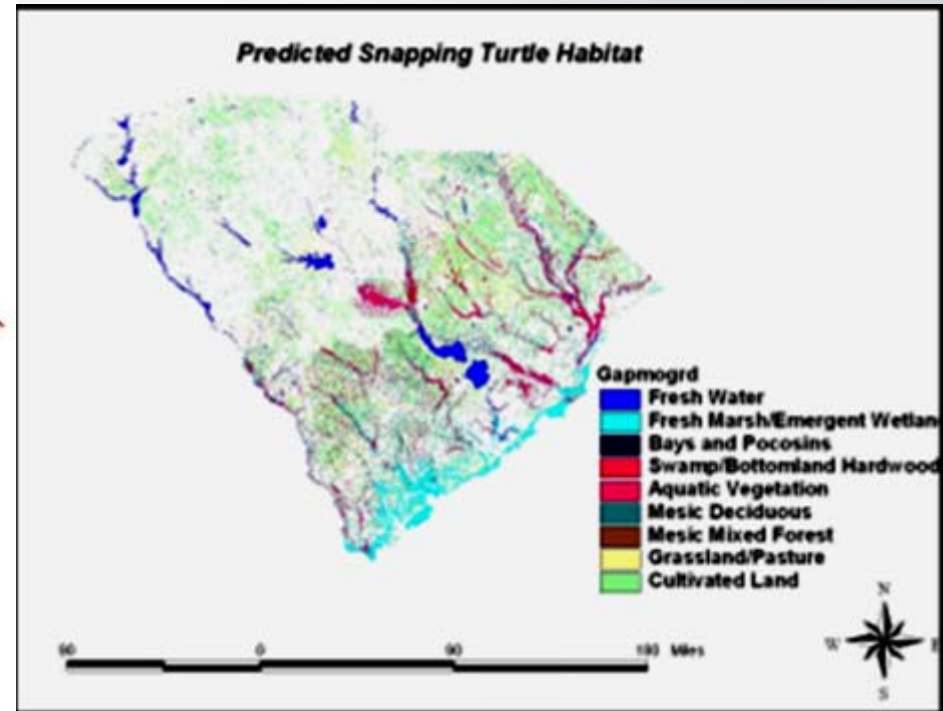
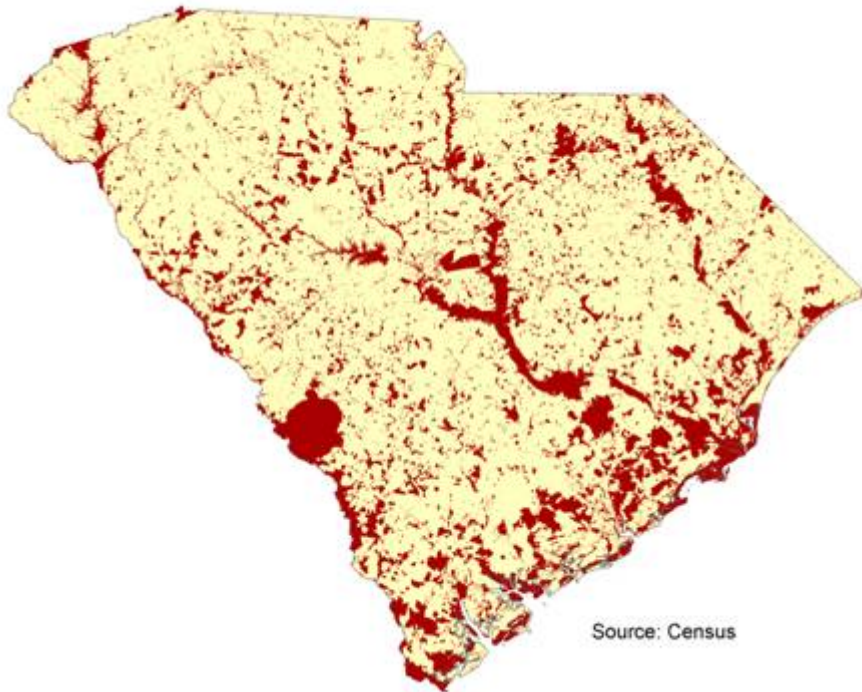
Places that Gained Population 2000 - 2004



Constraints



Unpopulated areas 2000

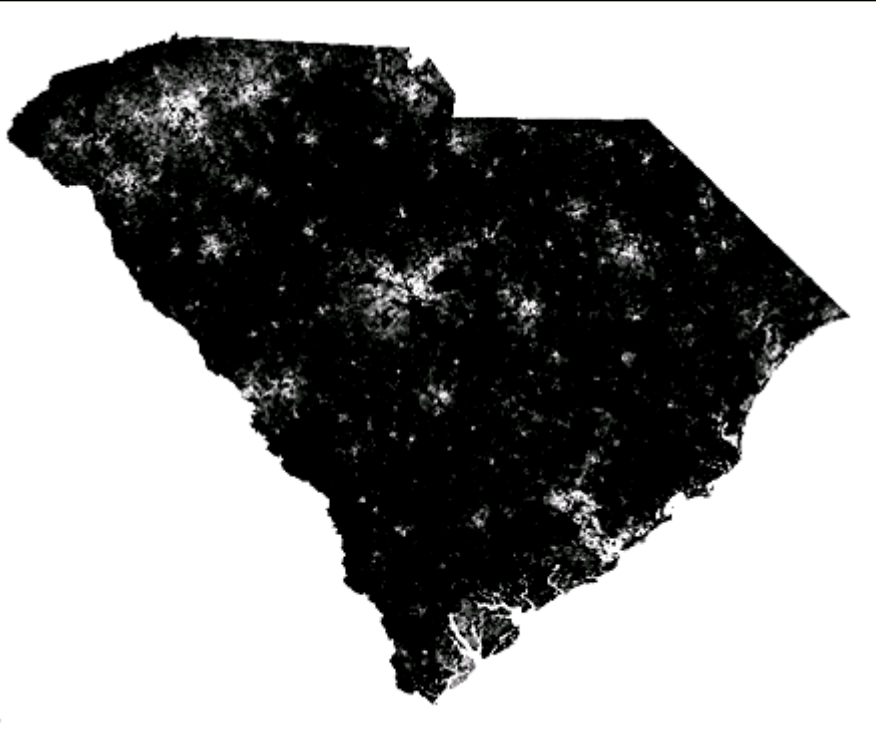


Source S.C. DNR

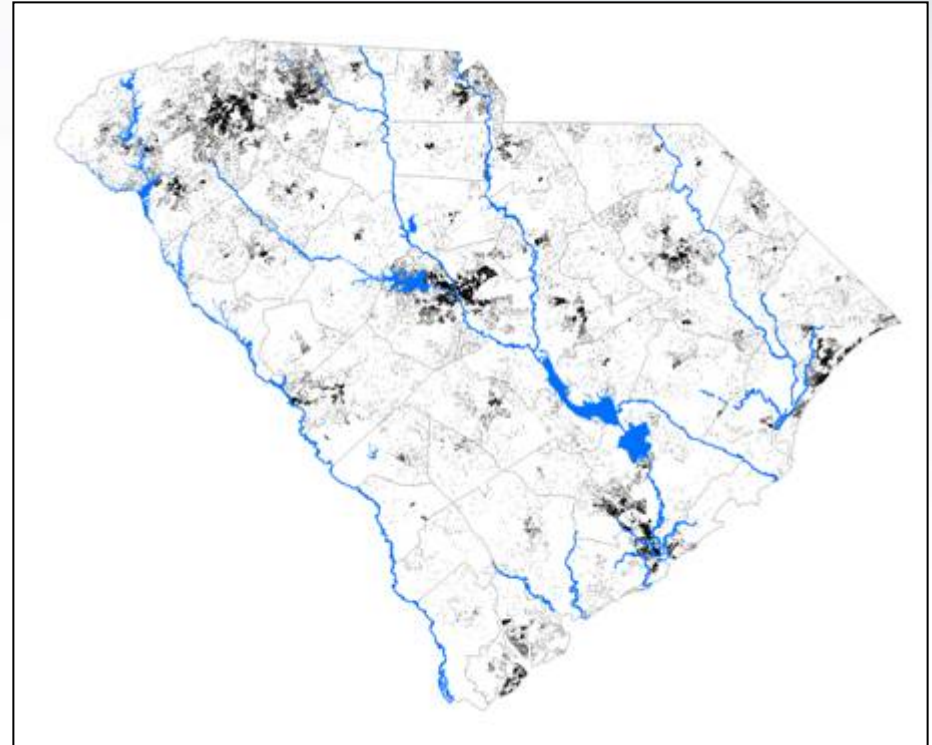
Populated Areas



“Night Time View of SC



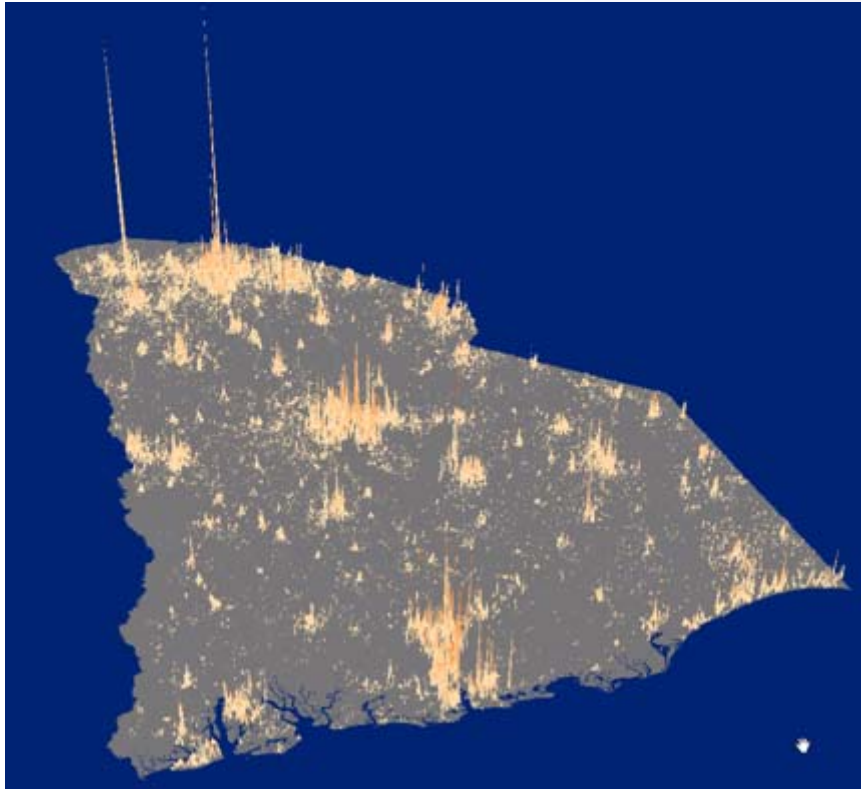
Dot Distribution Map



2000 Population & 2004 Growth



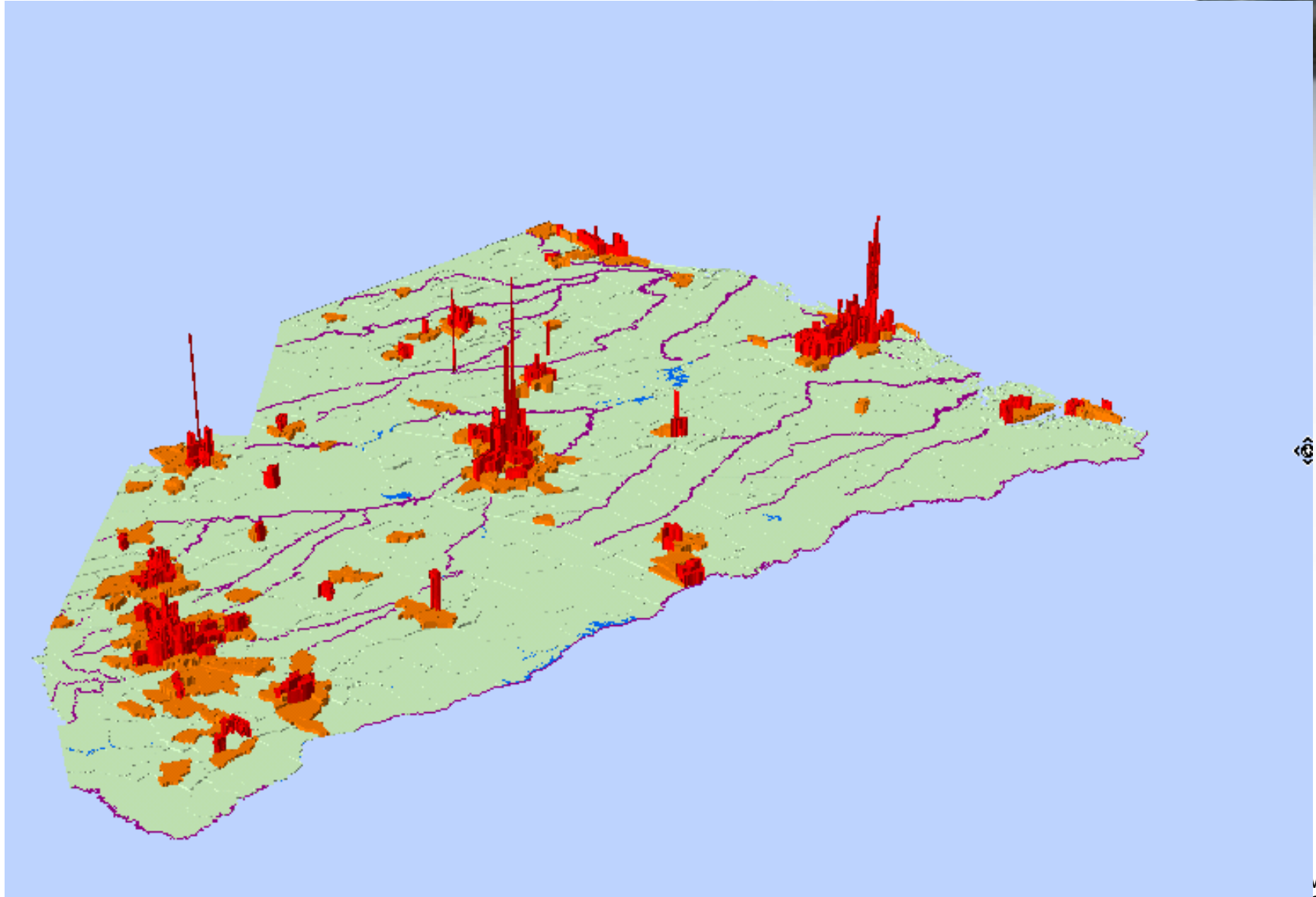
2000 Population



Fastest Growing Places
2000 - 2004



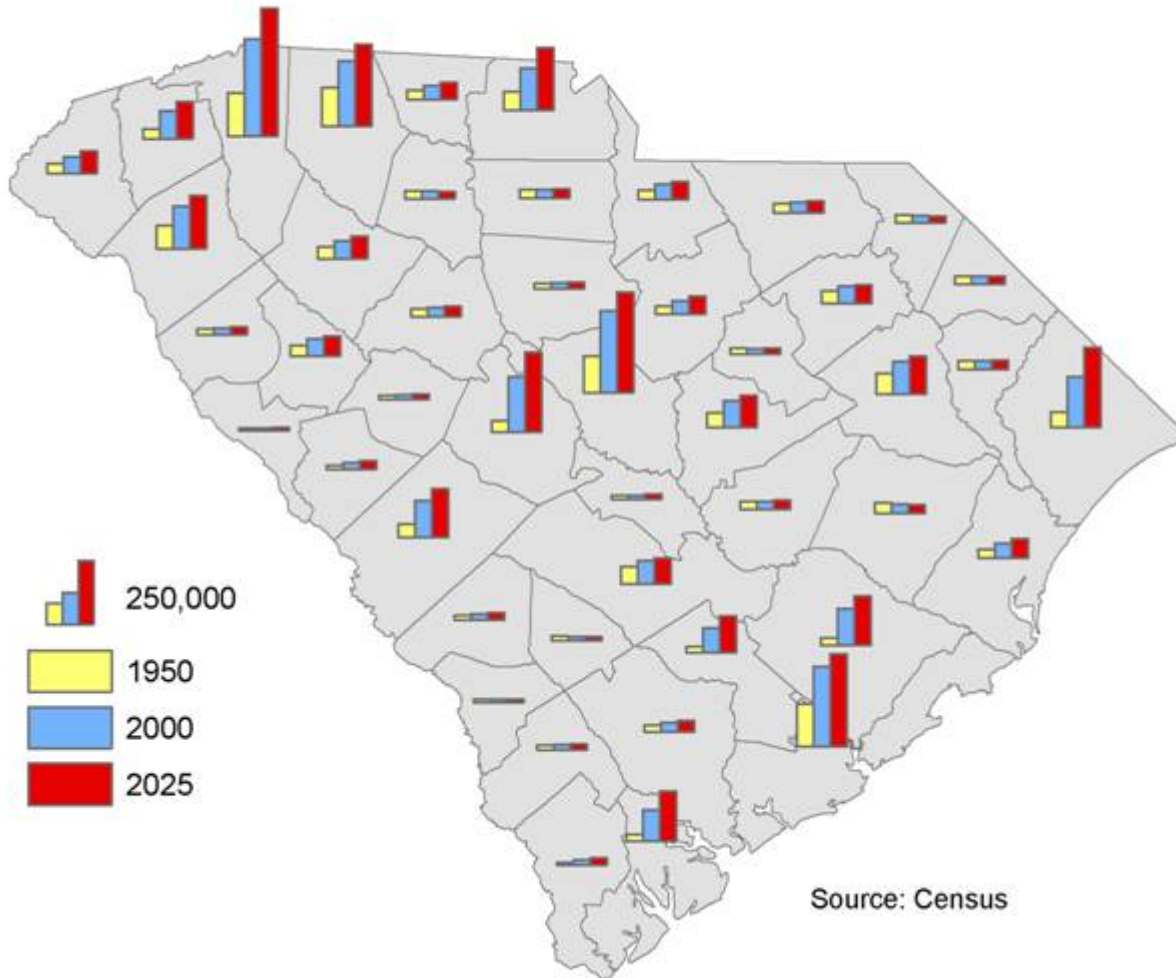
2000 BlockGroup Population



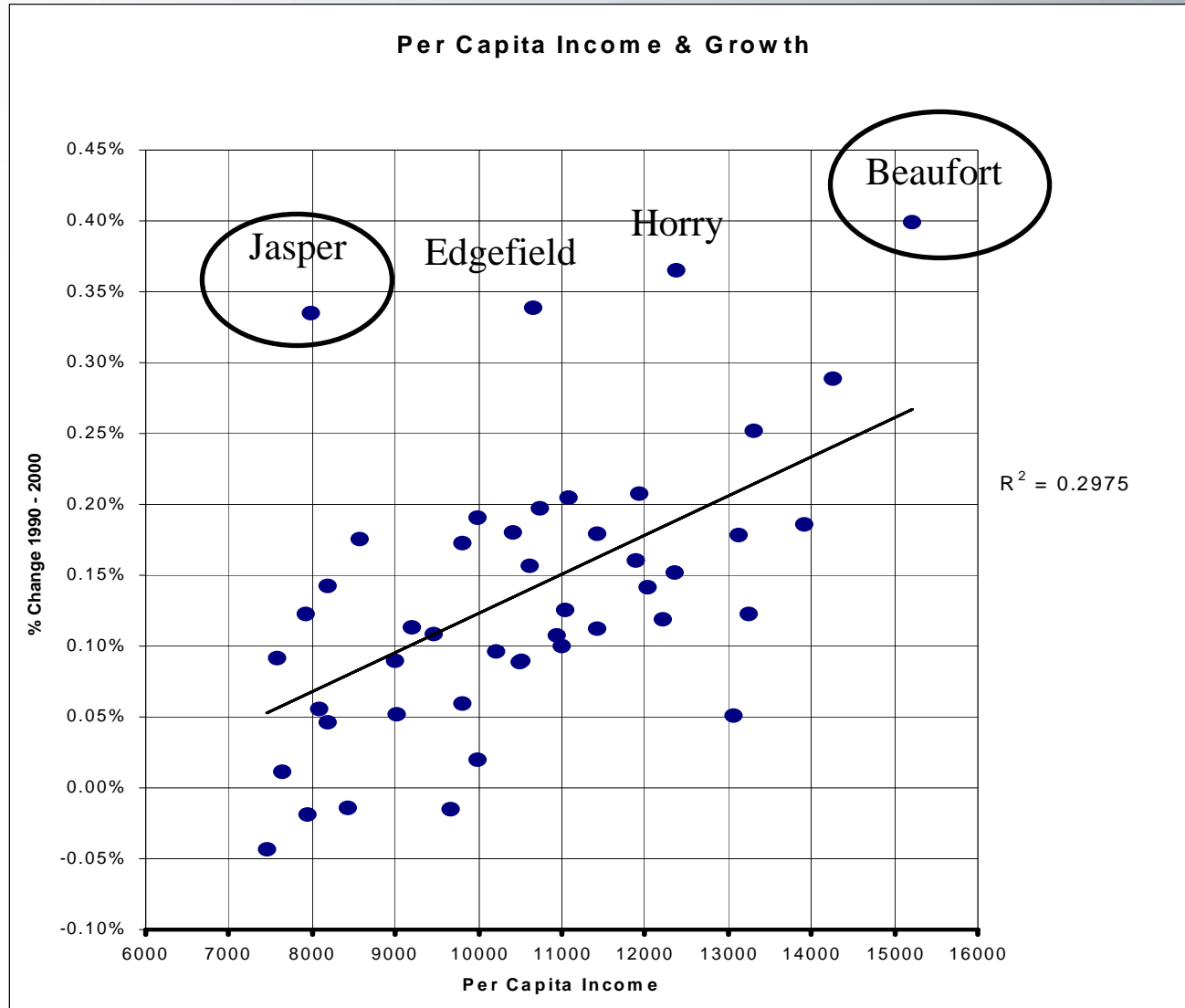
County Population Forecasts



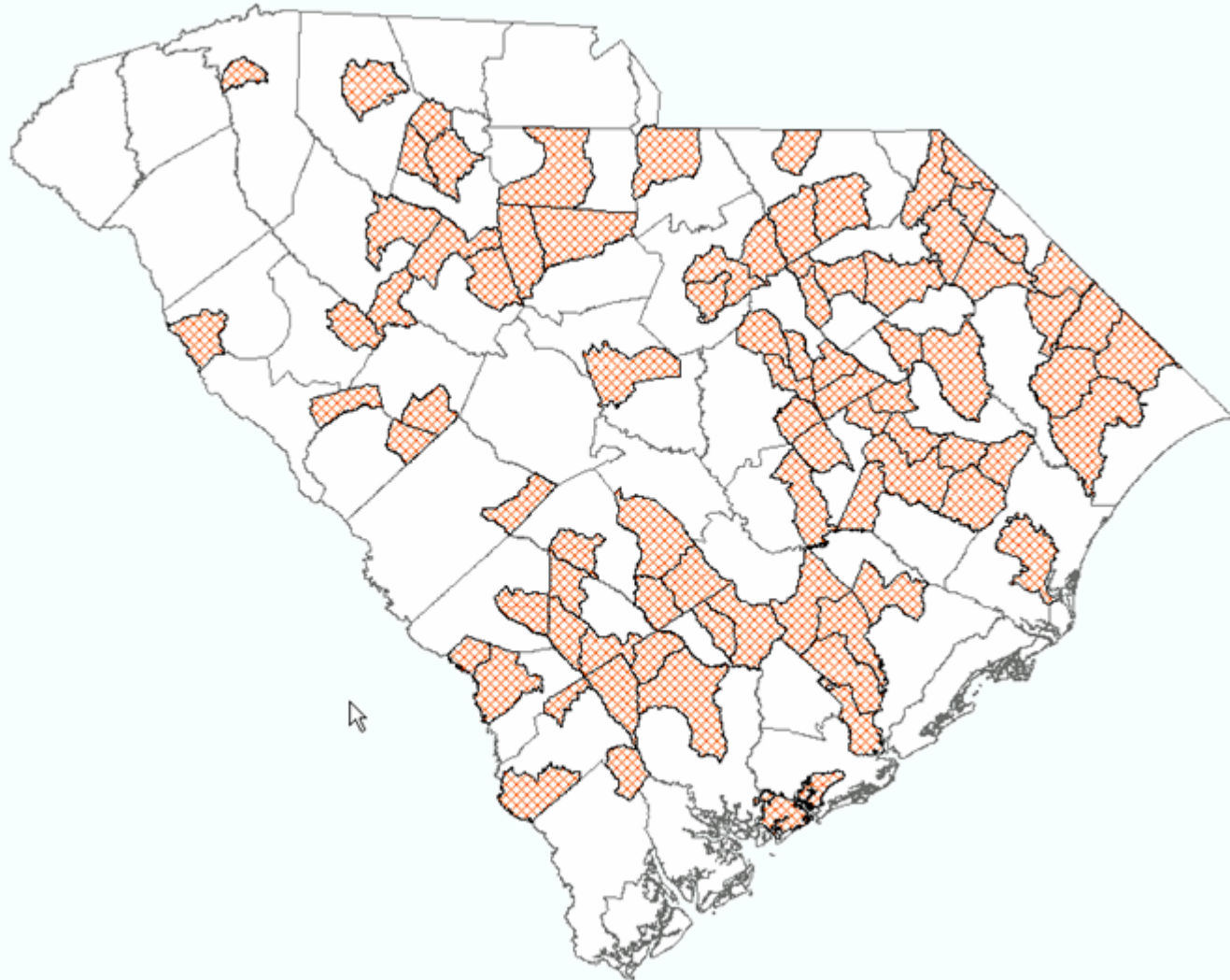
County Population 1950, 2000, & 2025



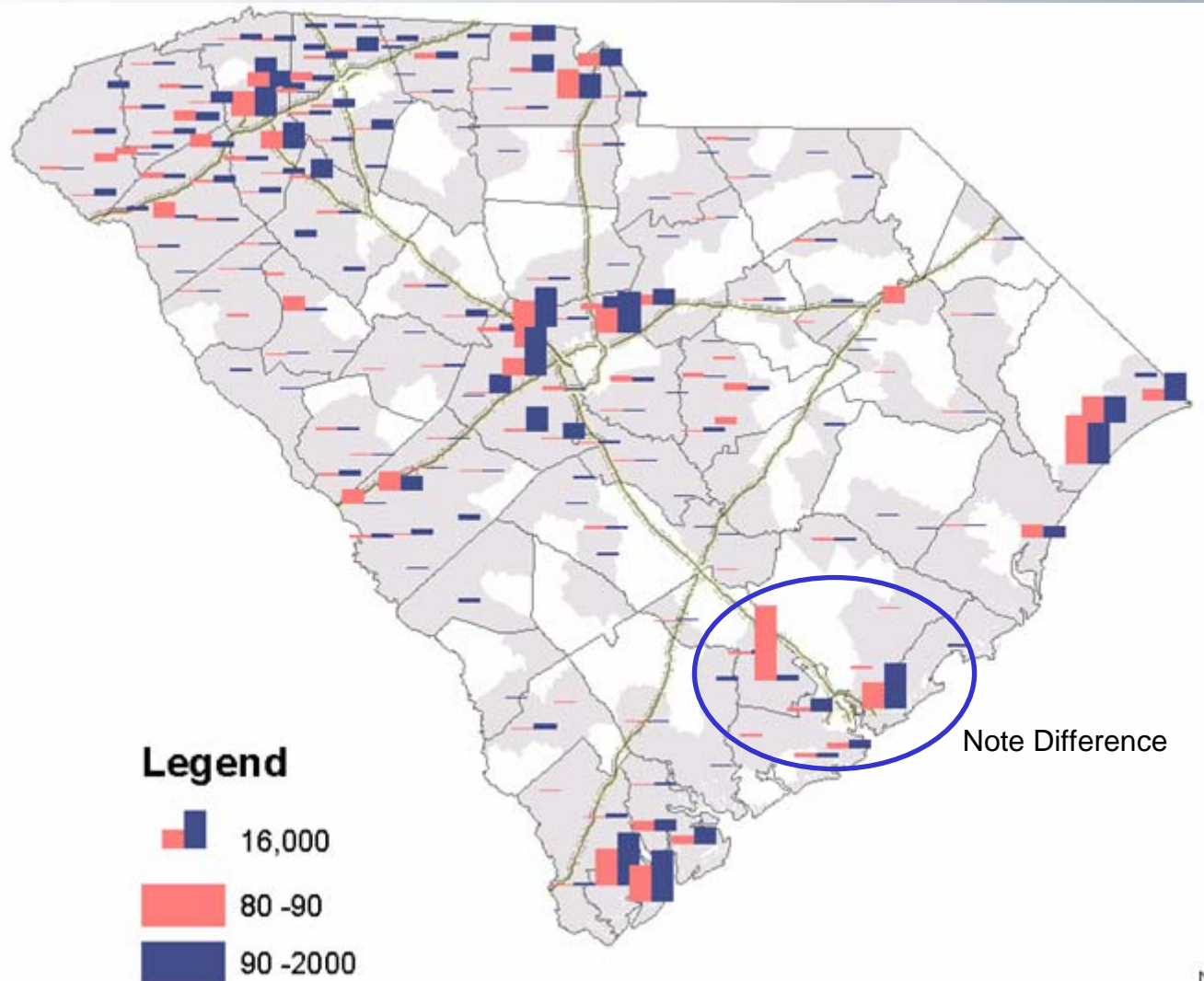
Income and Growth Rate



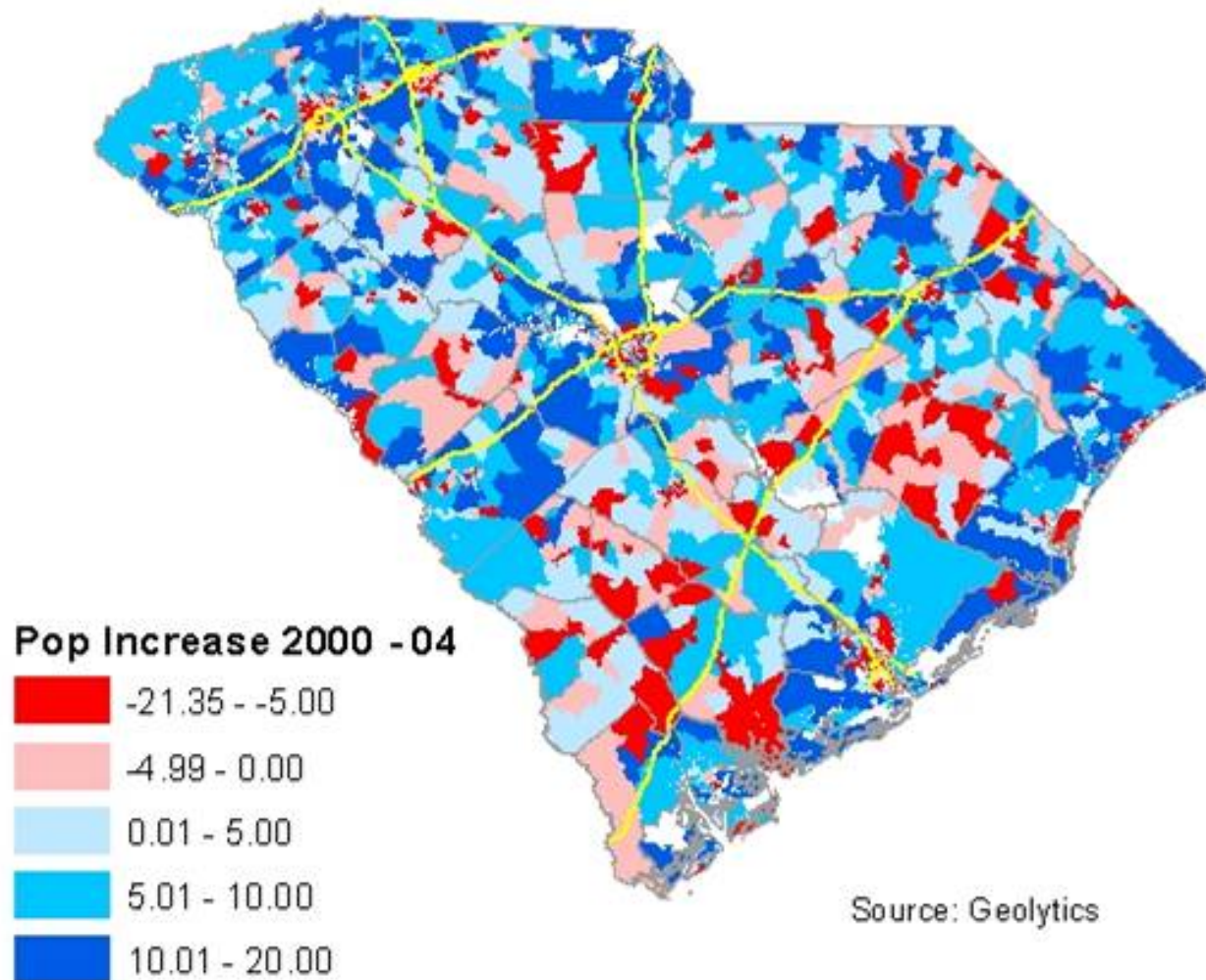
CCD lost population 1990 – 2000



Pop Increase 80's vs 90's

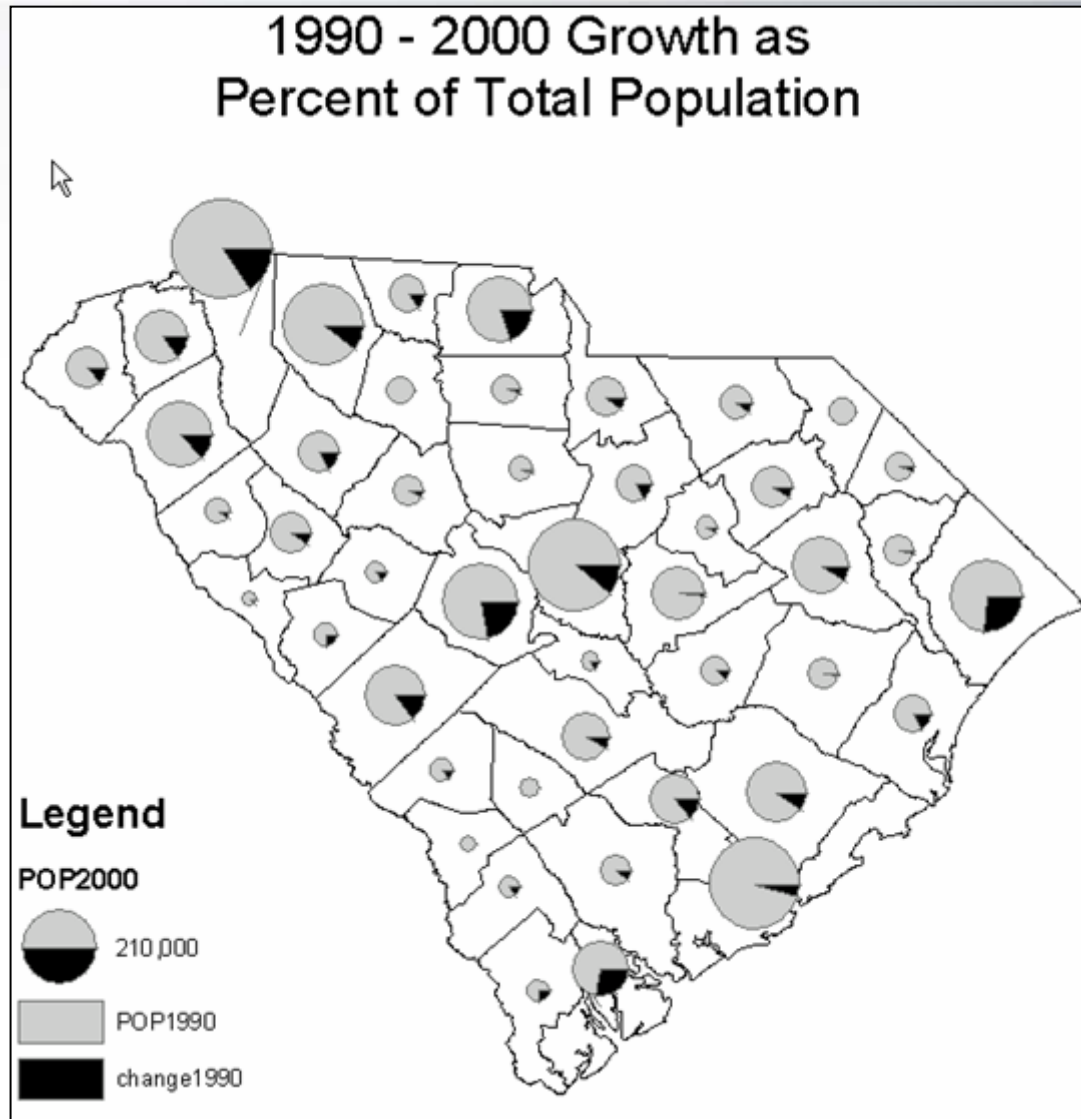


Estimated Population Increase 2000 - 2004 Block Groups



Source: Geolytics

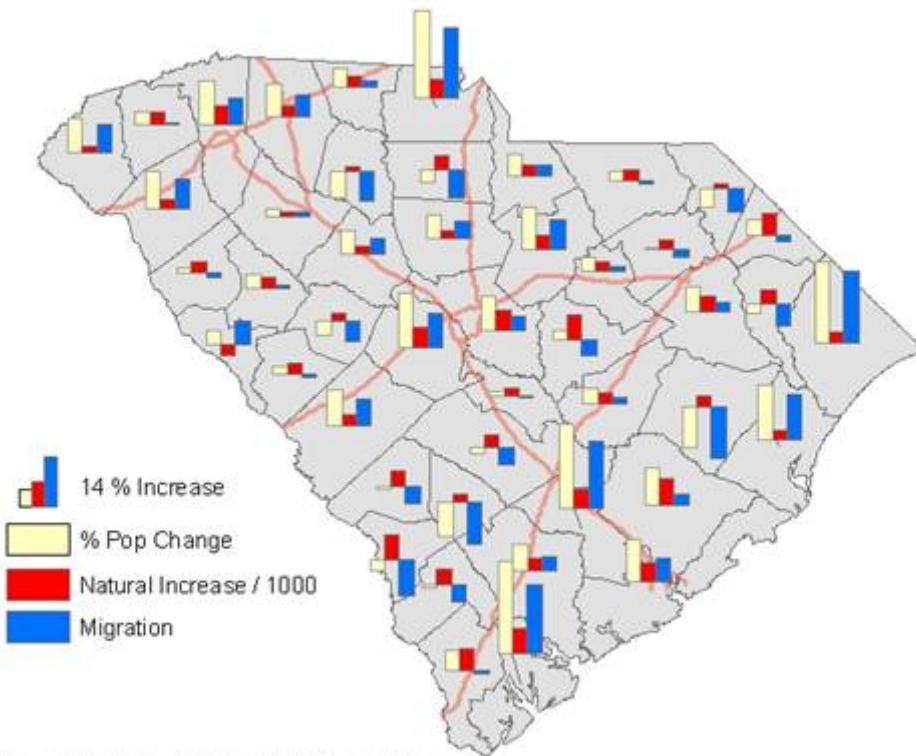
“Newcomers”



Demographic Changes 2000 - 2004

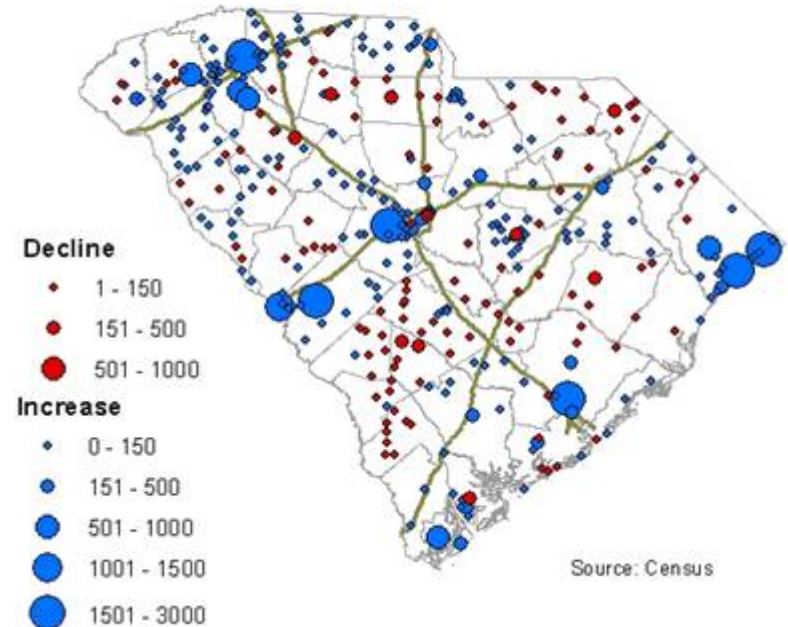


Demographic Changes 2000 - 2004



Source: Population Division, U.S. Census Bureau

Estimated Population Change 2000 - 2004 Places

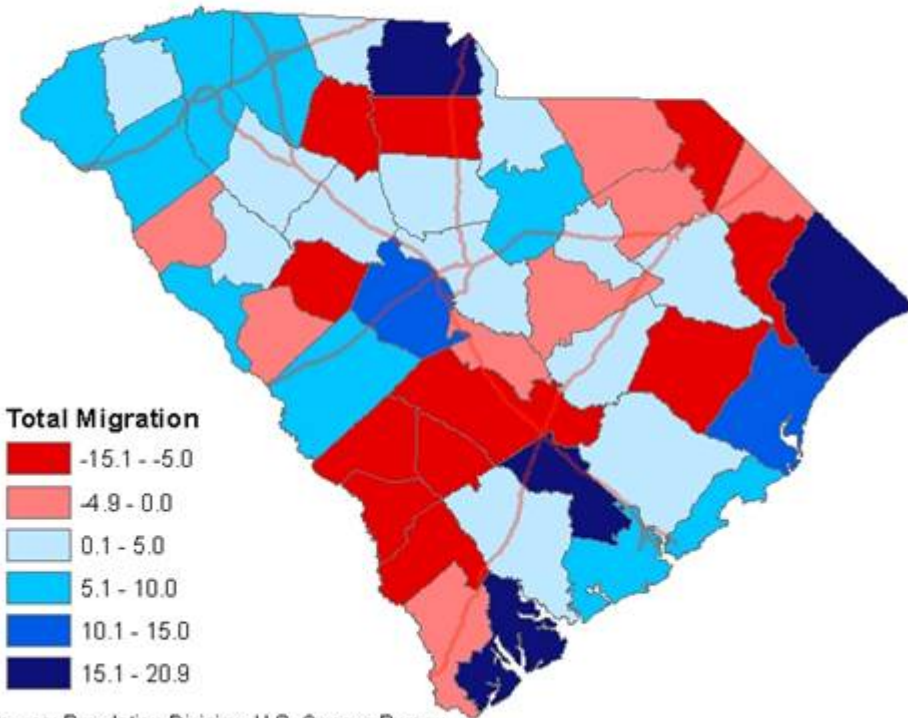


Source: Census

Migration and Natural Increase 2000 - 2004

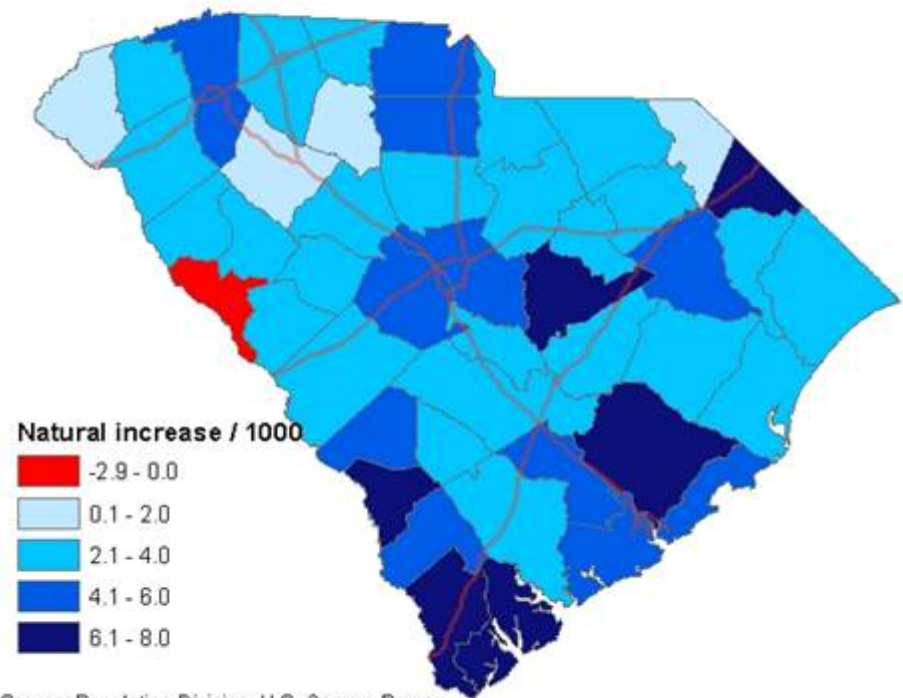


Migration 2000 - 2004



Source: Population Division, U.S. Census Bureau

Natural Increase 2000 - 2004



Source: Population Division, U.S. Census Bureau

Projected Growth to 2030

S.C from 26th to 19th - 28% Increase



**Interim Projections: Ranking of Census 2000 and
Projected 2030 State Population and Change: 2000 to 2030**

Census 2000 State	2000 Census Population	2000 Census Rank	2030 projections State	2030 Projections Population	2030 Projections Rank	Change: 2000 to 2030 State	Change: 2000 to 2030 Number	Change: 2000 to 2030 Percent	Change: 2000 to 2030 Rank in percent change
United States	281,421,906	(x)	United States	363,584,435	(x)	United States	82,162,529	29.2	(x)
California	33,871,648	1	California	46,444,861	1	.Nevada	2,283,845	114.3	1
Texas	20,851,820	2	Texas	33,317,744	2	.Arizona	5,581,765	108.8	2
New York	18,976,457	3	Florida	28,685,769	3	.Florida	12,703,391	79.5	3
Florida	15,982,378	4	New York	19,477,429	4	.Texas	12,465,924	59.8	4
Illinois	12,419,293	5	Illinois	13,432,892	5	.Utah	1,252,198	56.1	5
Pennsylvania	12,281,054	6	Pennsylvania	12,768,184	6	.Idaho	675,671	52.2	6
Ohio	11,353,140	7	North Carolina	12,227,739	7	.North Carolina	4,178,426	51.9	7
Michigan	9,938,444	8	Georgia	12,017,838	8	.Georgia	3,831,385	46.8	8
New Jersey	8,414,350	9	Ohio	11,550,528	9	.Washington	2,730,680	46.3	9
Georgia	8,186,453	10	Arizona	10,712,397	10	.Oregon	1,412,519	41.3	10
North Carolina	8,049,313	11	Michigan	10,694,172	11	.Virginia	2,746,504	38.8	11
Virginia	7,078,515	12	Virginia	9,825,019	12	.Alaska	240,742	38.4	12
Massachusetts	6,349,097	13	New Jersey	9,802,440	13	.California	12,573,213	37.1	13
Indiana	6,080,485	14	Washington	8,624,801	14	.Colorado	1,491,096	34.7	14
Washington	5,894,121	15	Tennessee	7,380,634	15	.New Hampshire	410,685	33.2	15
Tennessee	5,689,283	16	Maryland	7,022,251	16	.Maryland	1,725,765	32.6	16
Missouri	5,595,211	17	Massachusetts	7,012,009	17	.Tennessee	1,691,351	29.7	17
Wisconsin	5,363,675	18	Indiana	6,810,108	18	.Delaware	229,058	29.2	18
Maryland	5,296,486	19	Missouri	6,430,173	19	.South Carolina	1,136,557	28.3	19
Arizona	5,130,632	20	Minnesota	6,306,130	20	.Minnesota	1,386,651	28.2	20
Minnesota	4,919,479	21	Wisconsin	6,150,764	21	.Arkansas	566,808	21.2	21
Louisiana	4,468,976	22	Colorado	5,792,357	22	.Hawaii	254,509	21.0	22
Alabama	4,447,100	23	South Carolina	5,148,569	23	.Vermont	103,040	16.9	23
Colorado	4,301,261	24	Alabama	4,874,243	24	.New Jersey	1,388,090	16.5	24
Kentucky	4,041,769	25	Oregon	4,833,918	25	.Montana	142,703	15.8	25
South Carolina	4,012,012	26	Louisiana	4,802,633	26	.New Mexico	280,662	15.4	26

Footnote:

U.S. Census Bureau, Population Division, Interim State Population Projections, 2005.

Internet Release Date: April 21, 2005

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Common Ground 2005

Percent 65 and Older 2030- 22%



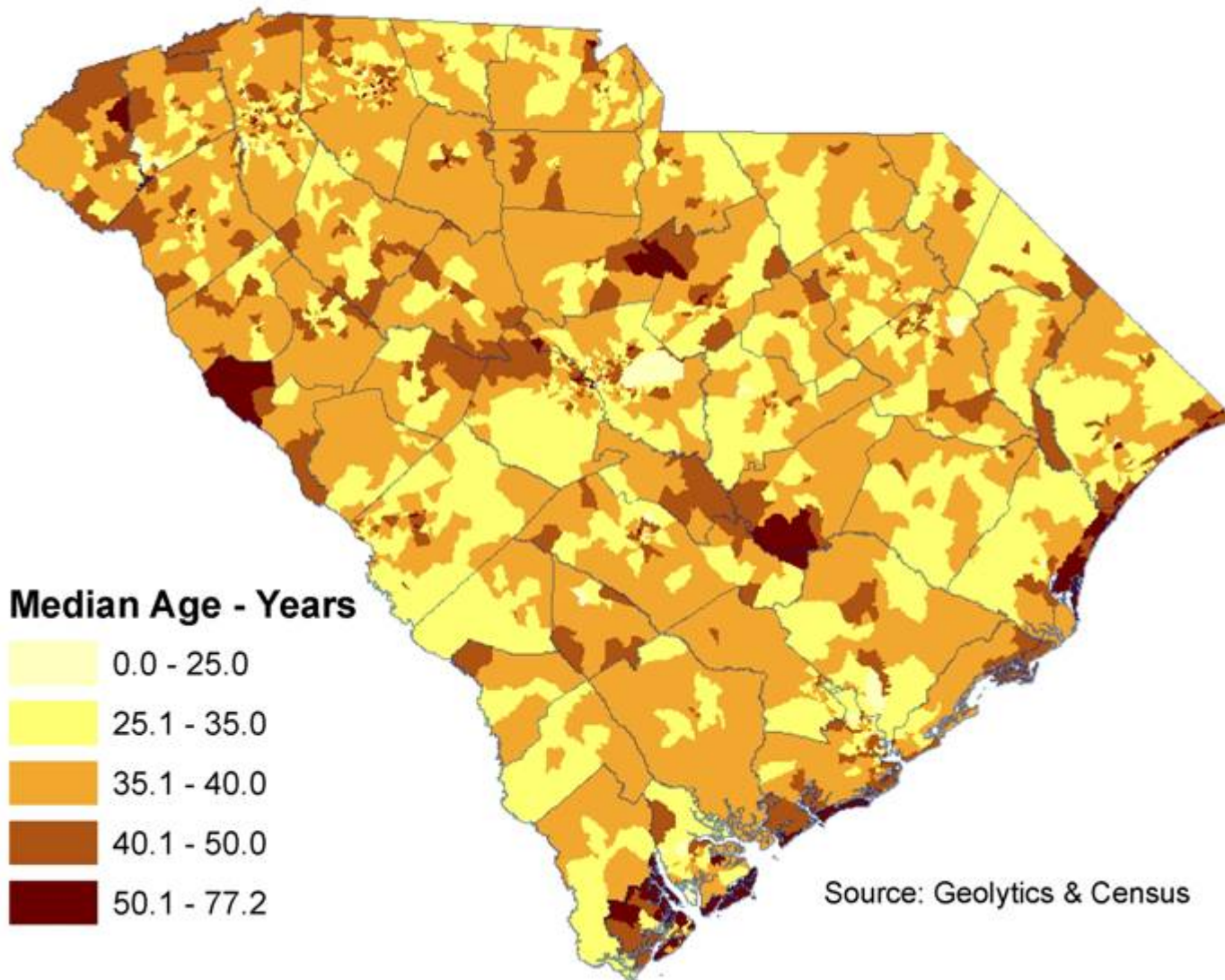
Interim Projections: Ranking of States by Projected Percent of Population Age 65 and Older: 2000, 2010, and 2030								
2000 State	2000 Percent	2000 Rank	2010 State	2010 Percent	2010 Rank	2030 State	2030 Percent	2030 Rank
United States	12.4	(x)	United States	13.0	(x)	United States	19.7	(x)
Florida	17.6	1	Florida	17.8	1	Florida	27.1	1
Pennsylvania	15.6	2	West Virginia	16.0	2	Maine	26.5	2
West Virginia	15.3	3	Maine	15.6	3	Wyoming	26.5	3
Iowa	14.9	4	Pennsylvania	15.5	4	New Mexico	26.4	4
North Dakota	14.7	5	North Dakota	15.3	5	Montana	25.8	5
Rhode Island	14.5	6	Montana	15.0	6	North Dakota	25.1	6
Maine	14.4	7	Iowa	14.9	7	West Virginia	24.8	7
South Dakota	14.3	8	South Dakota	14.6	8	Vermont	24.4	8
Arkansas	14.0	9	Connecticut	14.4	9	Delaware	23.5	9
Connecticut	13.8	10	Arkansas	14.3	10	South Dakota	23.1	10
Nebraska	13.6	11	Vermont	14.3	11	Pennsylvania	22.6	11
Massachusetts	13.5	12	Hawaii	14.3	12	Iowa	22.4	12
Missouri	13.5	13	Delaware	14.1	13	Hawaii	22.3	13
Montana	13.4	14	Alabama	14.1	14	Arizona	22.1	14
Ohio	13.3	15	Rhode Island	14.1	15	South Carolina	22.0	15
Hawaii	13.3	16	New Mexico	14.1	16	Connecticut	21.5	16
Kansas	13.3	17	Wyoming	14.0	17	New Hampshire	21.4	17
New Jersey	13.2	18	Arizona	13.9	18	Rhode Island	21.4	18
Oklahoma	13.2	19	Missouri	13.9	19	Wisconsin	21.3	19
Wisconsin	13.1	20	Oklahoma	13.8	20	Alabama	21.3	20
Alabama	13.0	21	Nebraska	13.8	21	Massachusetts	20.9	21
Arizona	13.0	22	Ohio	13.7	22	Nebraska	20.6	22
Delaware	13.0	23	Massachusetts	13.7	23	Mississippi	20.5	23
New York	12.9	24	New Jersey	13.7	24	Ohio	20.4	24
Oregon	12.8	25	New York	13.6	25	Arkansas	20.3	25
Vermont	12.7	26	South Carolina	13.6	26	Missouri	20.2	26
Kentucky	12.5	27	Wisconsin	13.5	27	Kansas	20.2	27
Indiana	12.4	28	Kansas	13.4	28	New York	20.1	28
Tennessee	12.4	29	Tennessee	13.3	29	New Jersey	20.0	29
Michigan	12.3	30	Kentucky	13.1	30	Kentucky	19.8	30
District of Columbia	12.2	31	Oregon	13.0	31	Louisiana	19.7	31
South Carolina	12.1	32	Michigan	12.8	32	Michigan	19.5	32

Footnote:

U.S. Census Bureau, Population Division, Interim State Population Projections, 2005.

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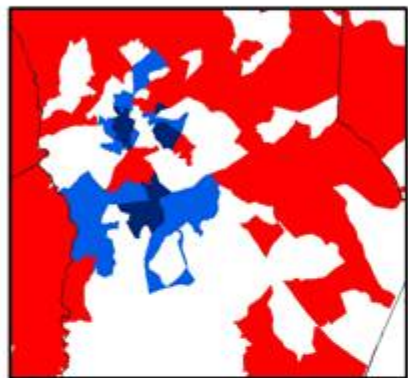
Median Age of Population 2000



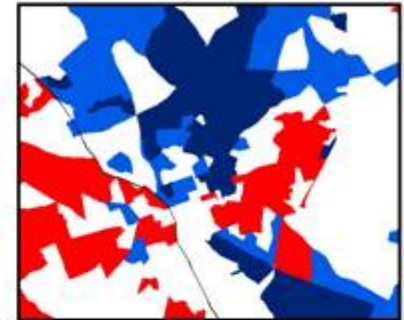


The Racial Divide - 2000 Block Group Population

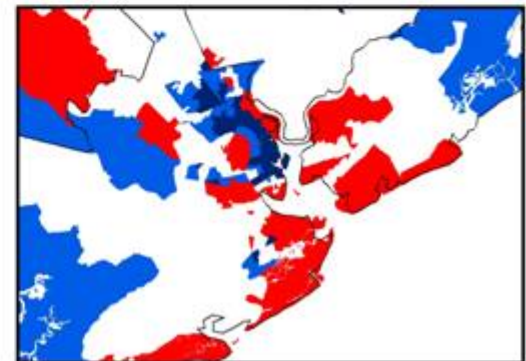
Greenville



Columbia



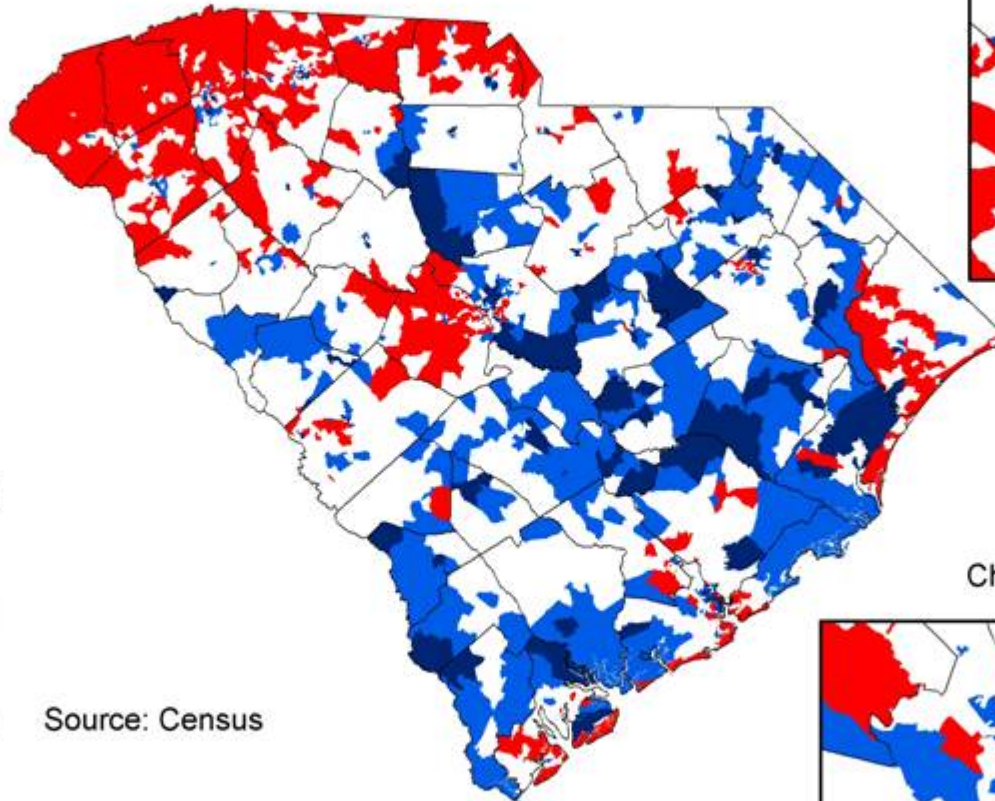
Charleston



% Af American



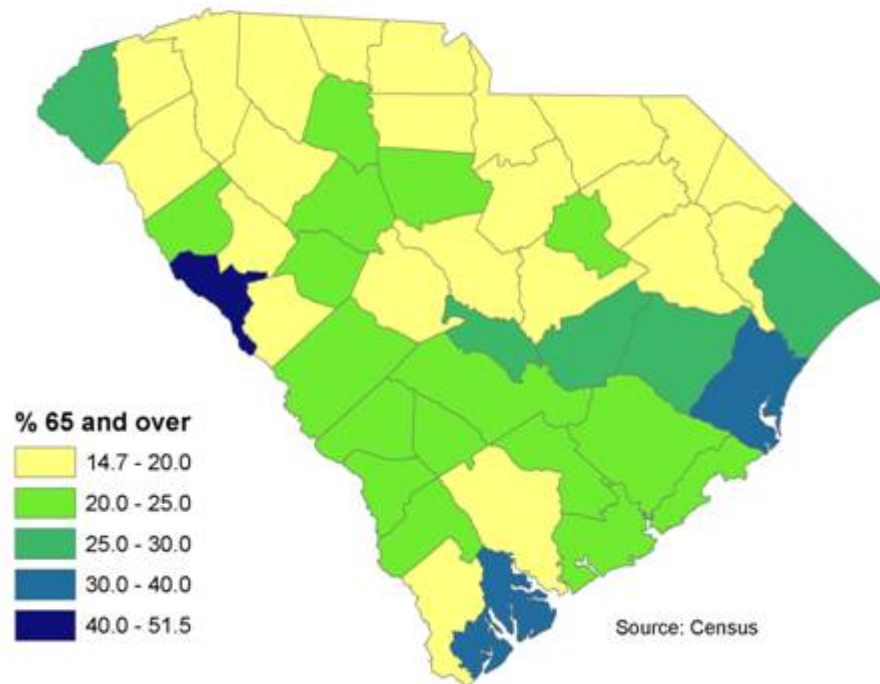
Source: Census



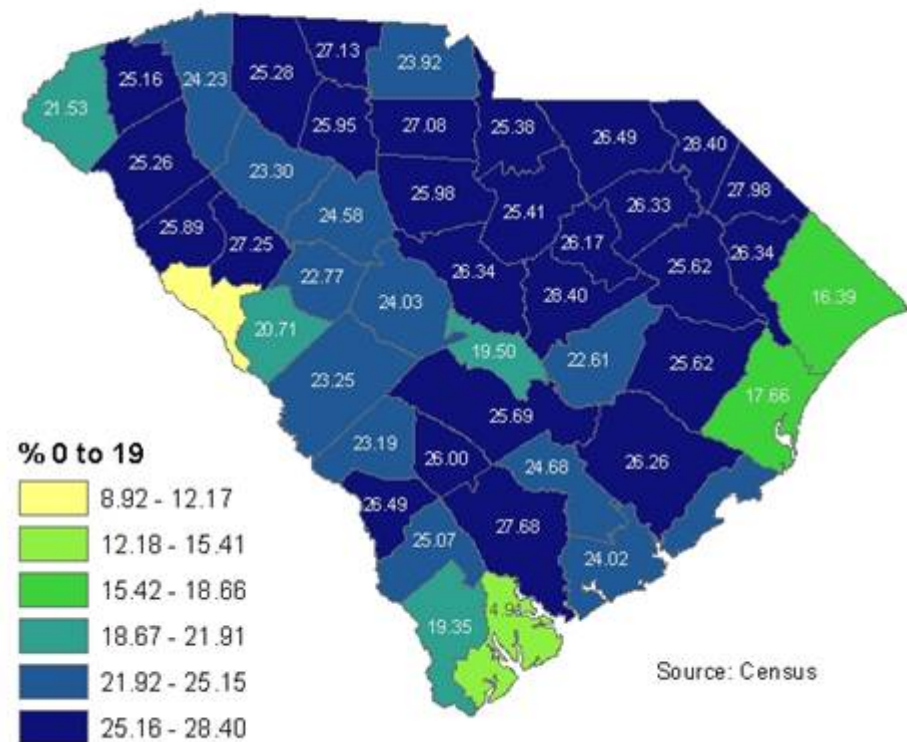
Projected Age Distribution 2025



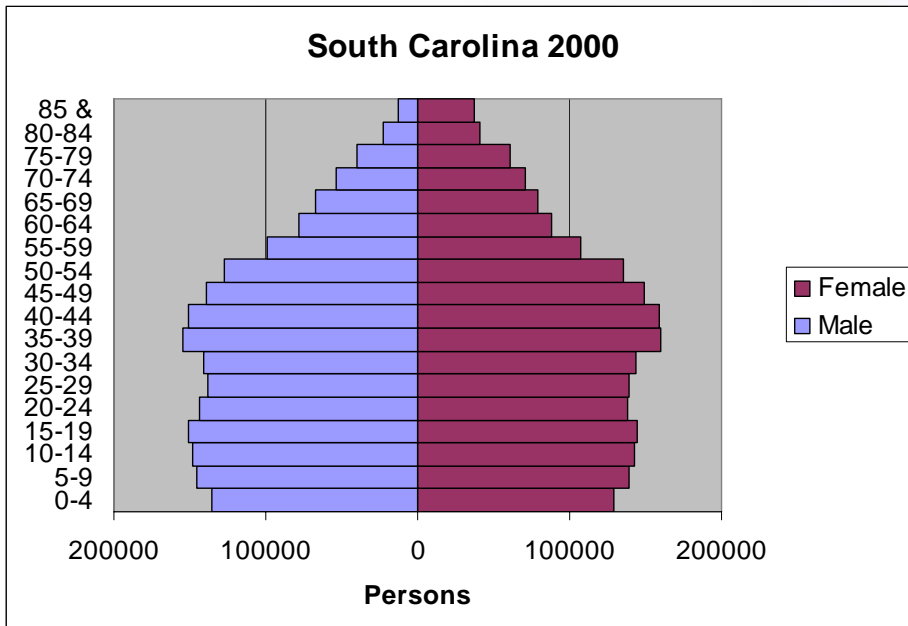
Percent of Population 65 and Over in 2025



Percent of Population 0 to 19 in 2025

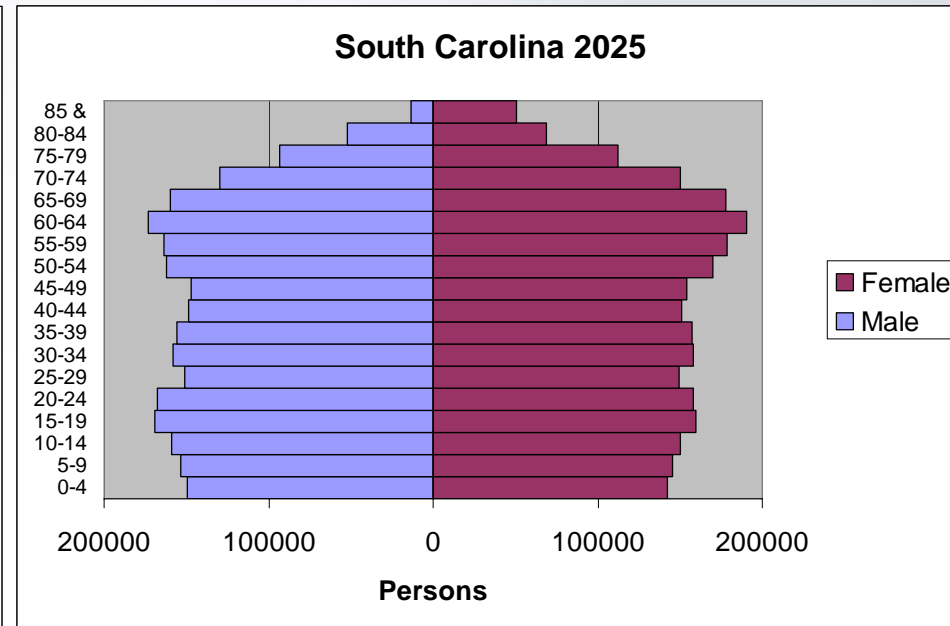


Population Pyramids 2000 -2025



Over 64 = 12.1%

School Age = 871,099 (21.7%)



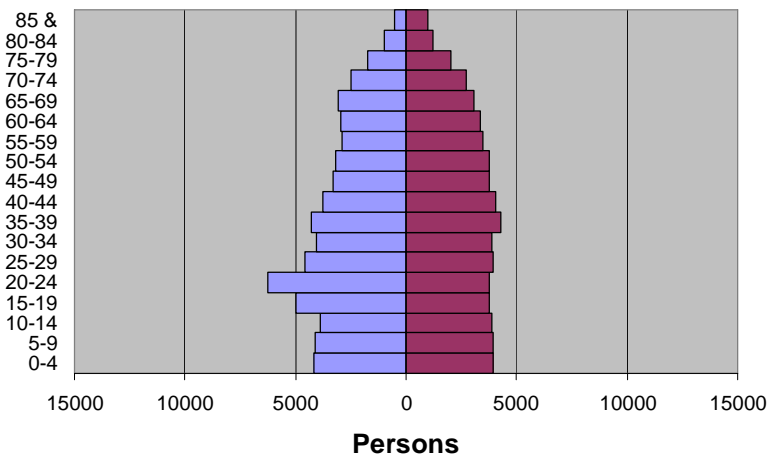
Over 64 = 19.6%

School Age = 937,370 (18.3%)

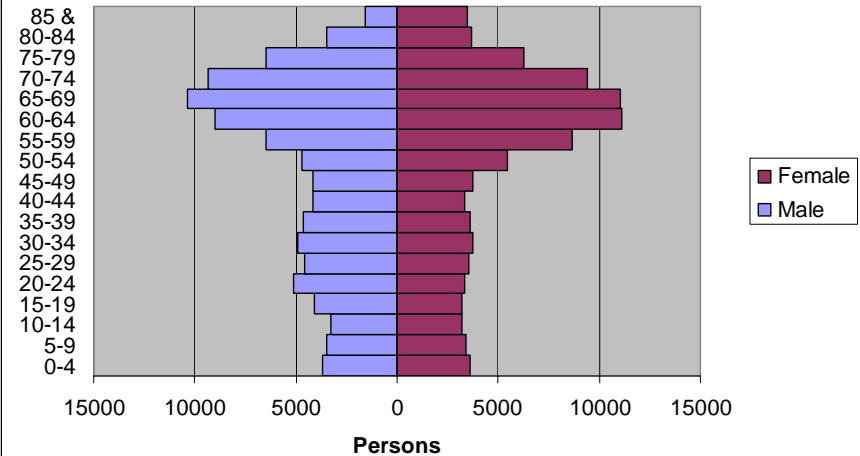
Population Pyramids: 2000 & 2025 Beaufort and York Counties



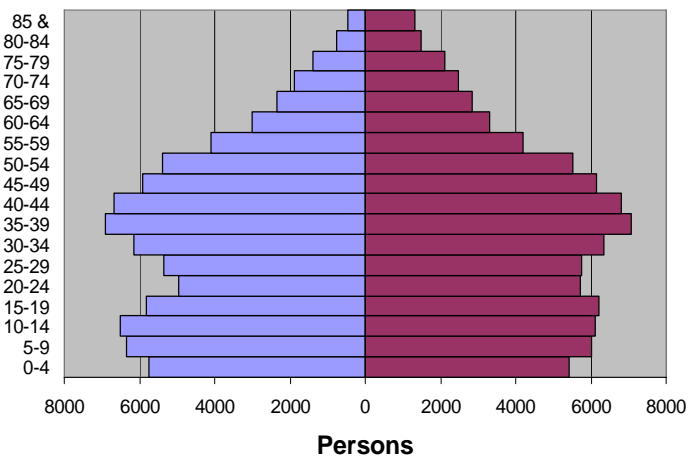
Beaufort County 2000



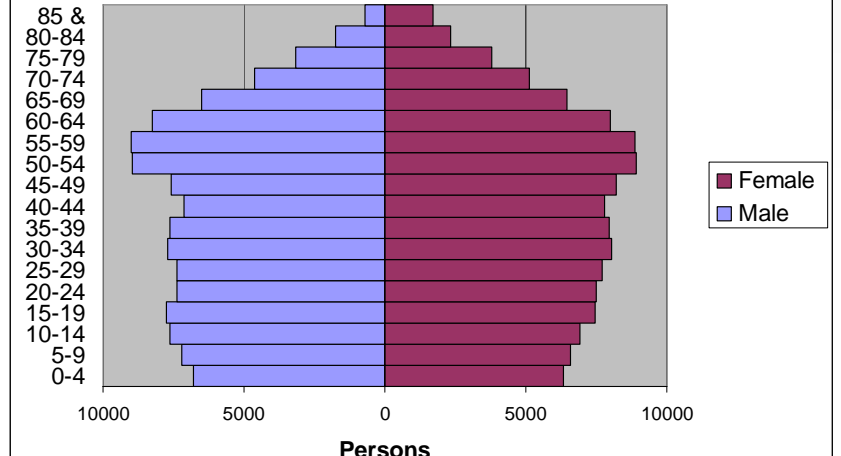
Beaufort County 2025



York County, 2000



York County 2025



Stages in the South Carolina Economy



- Rice and Indigo Economy – 1690's - 1790
- Cotton Economy – 1790 - 1860
- Textile & Apparel Economy 1880 – 1950
 - 1930 - 239 Mills, 94,800 workers (75%)
- Diverse Manufacturing Economy 1940 -
- Service and Trade
 - 1970 – 1997 31% to about 50% of labor force

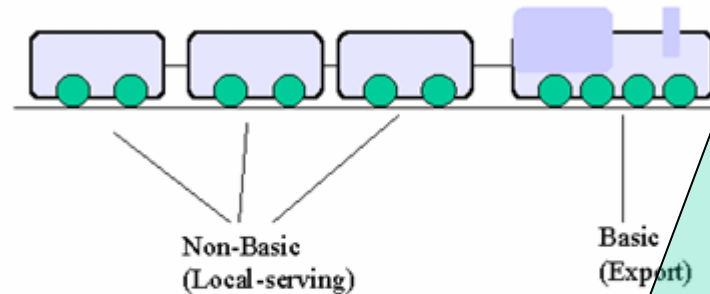
Export Base Theory



Net imports

- Financial Services
- Energy
- Metals
- Financial services
- Education
- Agricultural products
- Publishing/
- Information Technology
- Distribution
- Food
- Purchases in Augusta & Charlotte

Basic Sector as the Engine of an Economy



The Total employment is related to the basic employment by a factor called the **Base Multiplier**

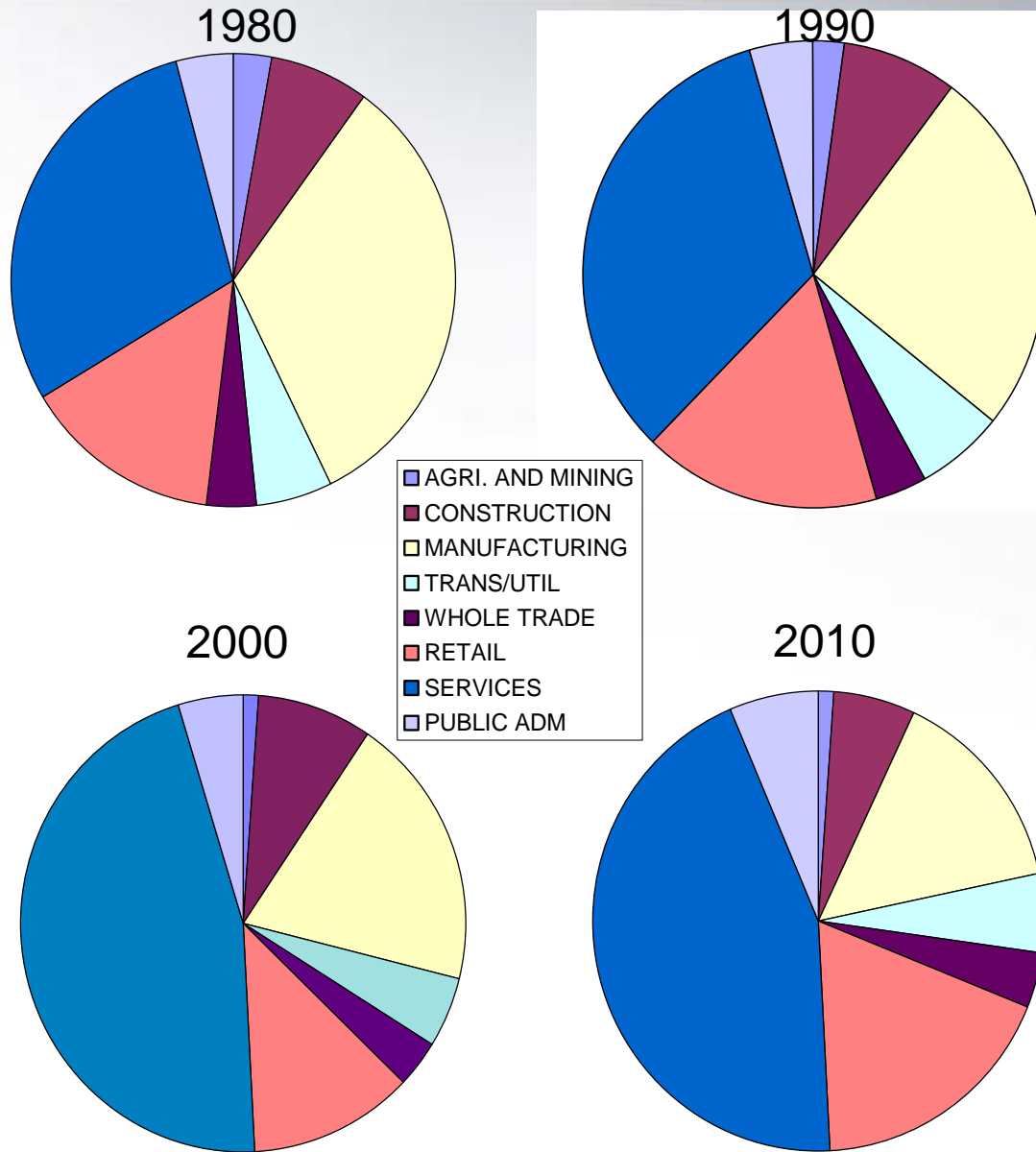
$$\text{Base Multiplier } r = \frac{\text{Total Employment } t}{\text{Total Basic Employment } t}$$

Net Exports

- Forest Products
- Textiles
- Apparel
- Plastics
- Biopharmaceuticals
- Automotive
- Chemicals
- Aerospace Engines
- Furniture
- Motor Driven Products
- Construction Materials
- Sporting Goods
- Power Generation
- /transmission
- Other Dollar Flows into State**
- Lottery
- Tuition
- Tourism
- Pension Plans
- Social Security
- Military Bases
- Charlotte Jobs
- Savannah River Site

Source: S.C. Competitive Initiative
Strategic Plan

Changing Employment Structure

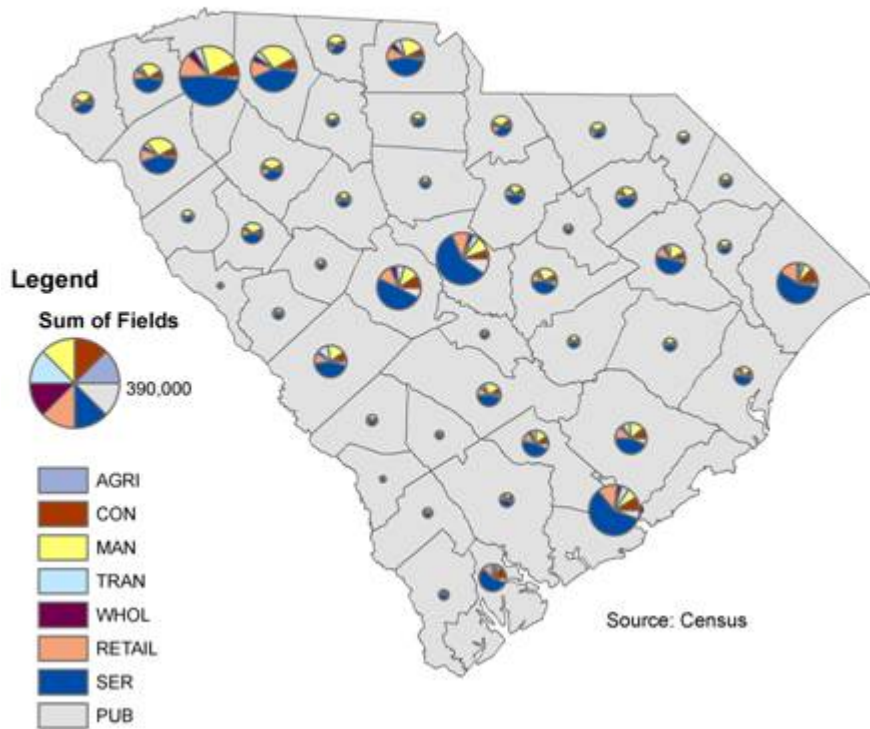


Employment 2000

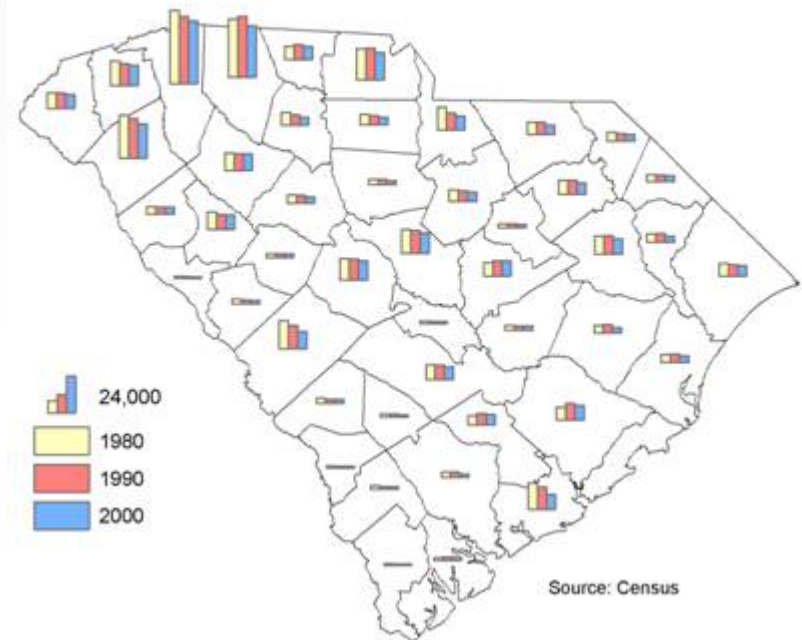
Manufacturing 1980 – 2000



2000 Employment by Industry



Decline in Manufacturing Employment 1980 - 2000

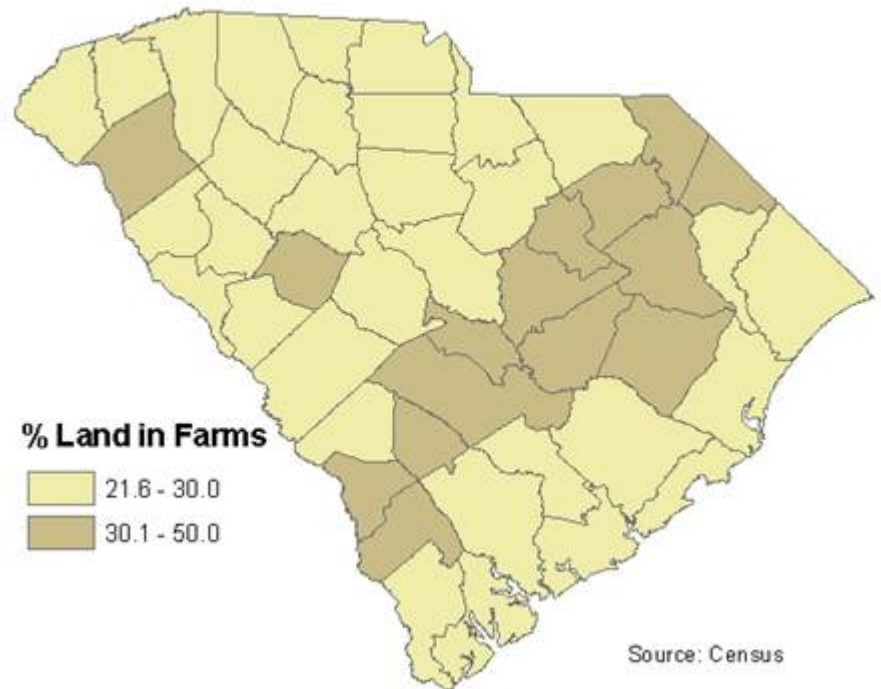
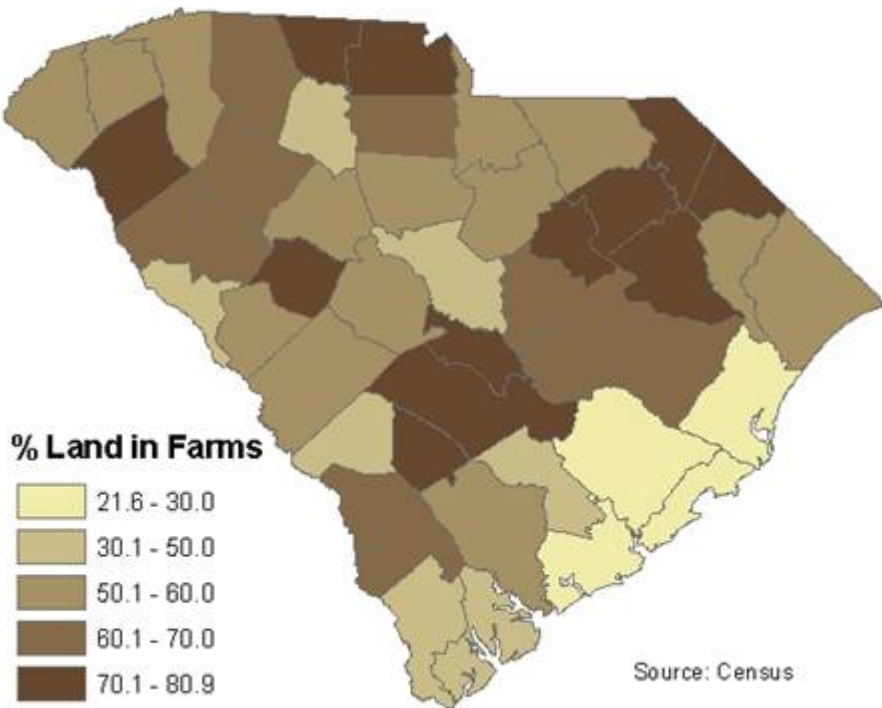


Changing Farm Land



Percent of Land in Farms 1954

Percent of Land in Farms 1997



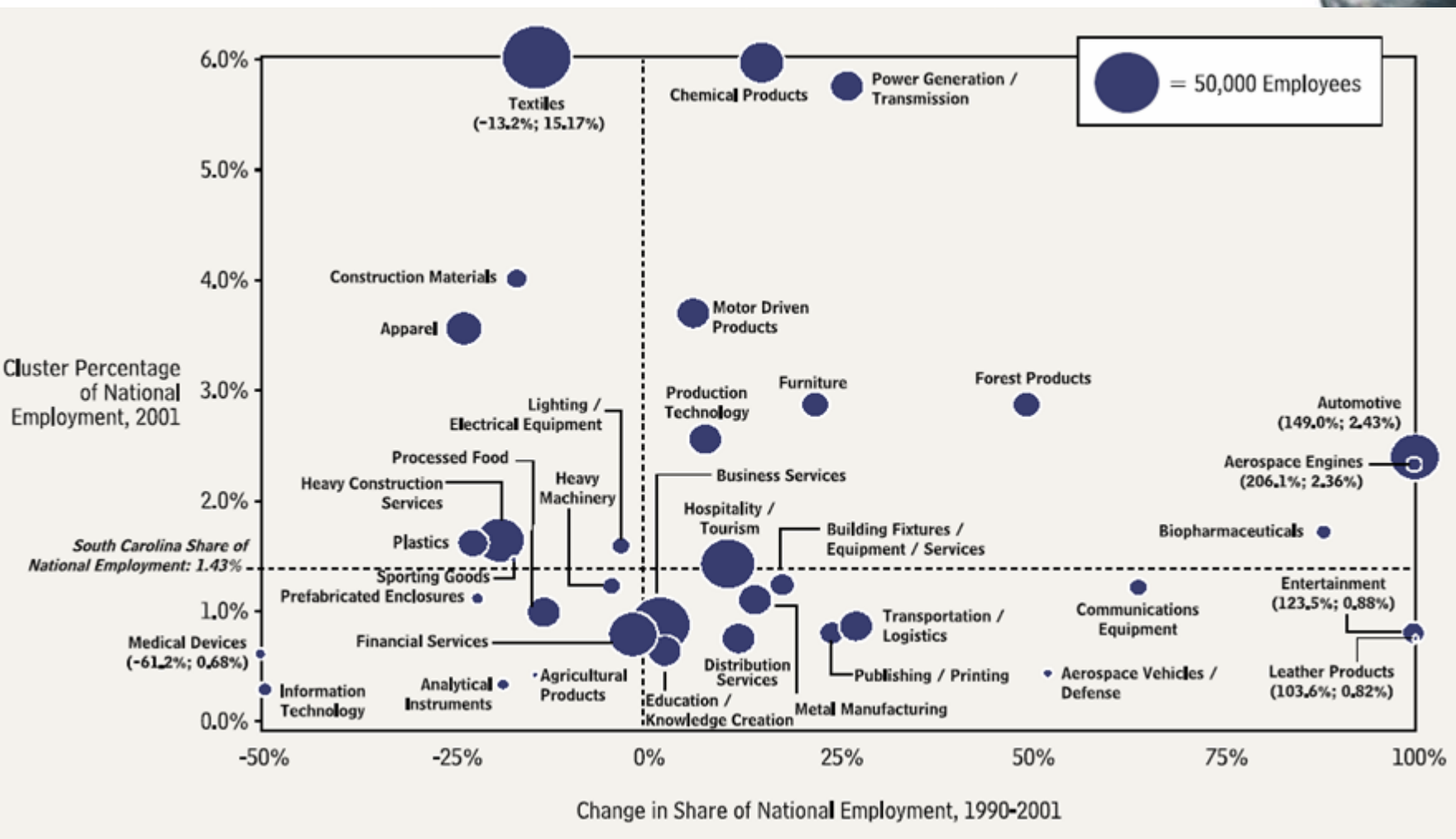
2002 Census of Business Allendale Vs. Greenville



Geographic area, tax status, and kind of business	Estab- lishments (number)	Receipts/ revenue (\$1,000)	Expenses (\$1,000)	Annual payroll (\$1,000)	First-quarter payroll (\$1,000)	Paid employees for pay period including March 12 (number)	Percent of receipts/ revenue—	
							From admini- strative records ¹	Estimated ²
ALLENDALE								
ALL ESTABLISHMENTS								
Other services (except public administration)	12	1 809	N	486	115	29	98.8	1.2
Personal and laundry services	5	983	N	281	69	18	100.0	—
GREENVILLE								
ALL ESTABLISHMENTS								
Other services (except public administration)	776	360 612	N	109 061	26 498	5 101	19.9	11.5

Establishments 12 versus 776
Payroll \$486,000 versus \$109,061,000

S.C. Industry Clusters



Source: SOUTH CAROLINA COMPETITIVENESS INITIATIVE:
A Strategic Plan for SOUTH CAROLINA

Nonagricultural Employment 1993 - 2003



Nonagricultural Employment in South Carolina (1993-2003)

YEAR	AVERAGE MONTHLY EMPLOYMENT			
	TOTAL NONAGRICULTURAL	MANUFACTURING	TEXTILE MILL PRODUCTS	APPAREL MANUFACTURING
1993	1,569,600	373,600	92,000	38,600
1994	1,607,200	377,400	91,800	34,600
1995	1,646,100	377,200	88,100	33,000
1996	1,675,200	366,000	81,400	29,000
1997	1,720,200	362,700	97,400	25,700
1998	1,783,600	362,100	76,000	22,500
1999	1,832,500	344,800	79,100	19,400
2000	1,812,500	277,100	40,400	5,300
2001	1,823,500	313,700	52,300	7,900
2002	1,808,500	291,700	45,300	6,600
2003	1,812,500	277,100	40,400	5,300
		-100,000	-52,000	-33,000

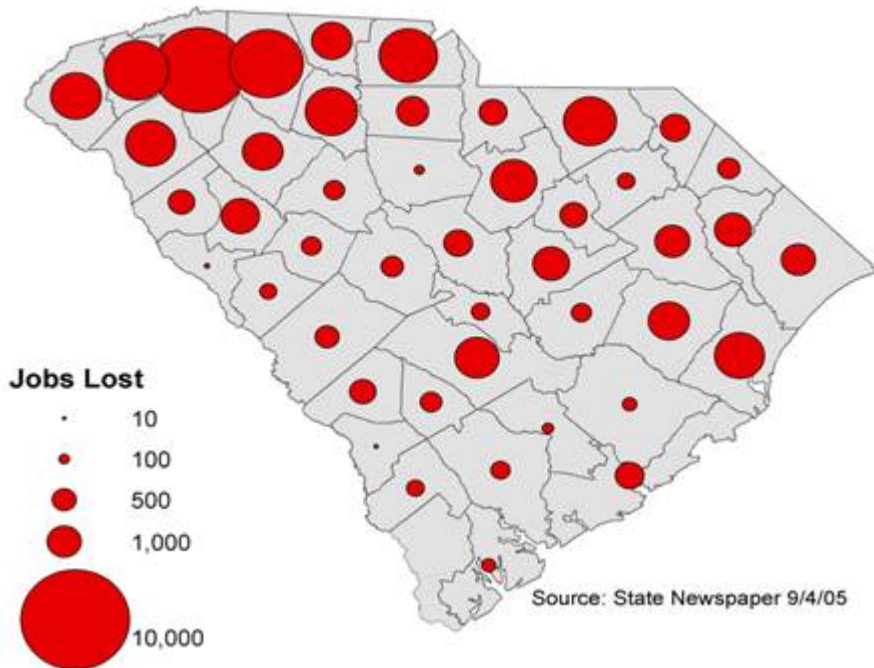
Note: Data rounded to nearest hundred.

Source: S.C. Employment Security Commission, *Current Employment Statistics*.

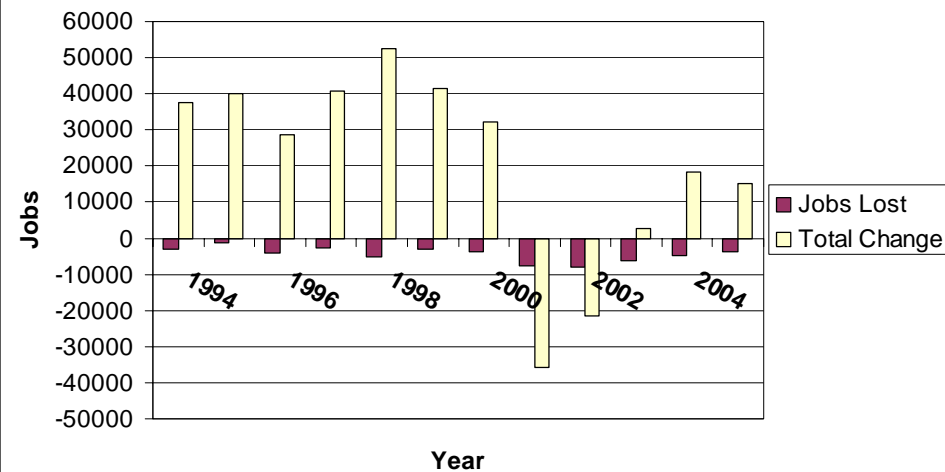
Job Loss



Jobs Lost to Exports & Offshoring
1994 - 2005



Jobs Lost to Exports and Net Change in Private
Sector Jobs 1994 - 2005

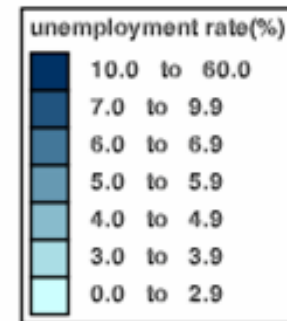
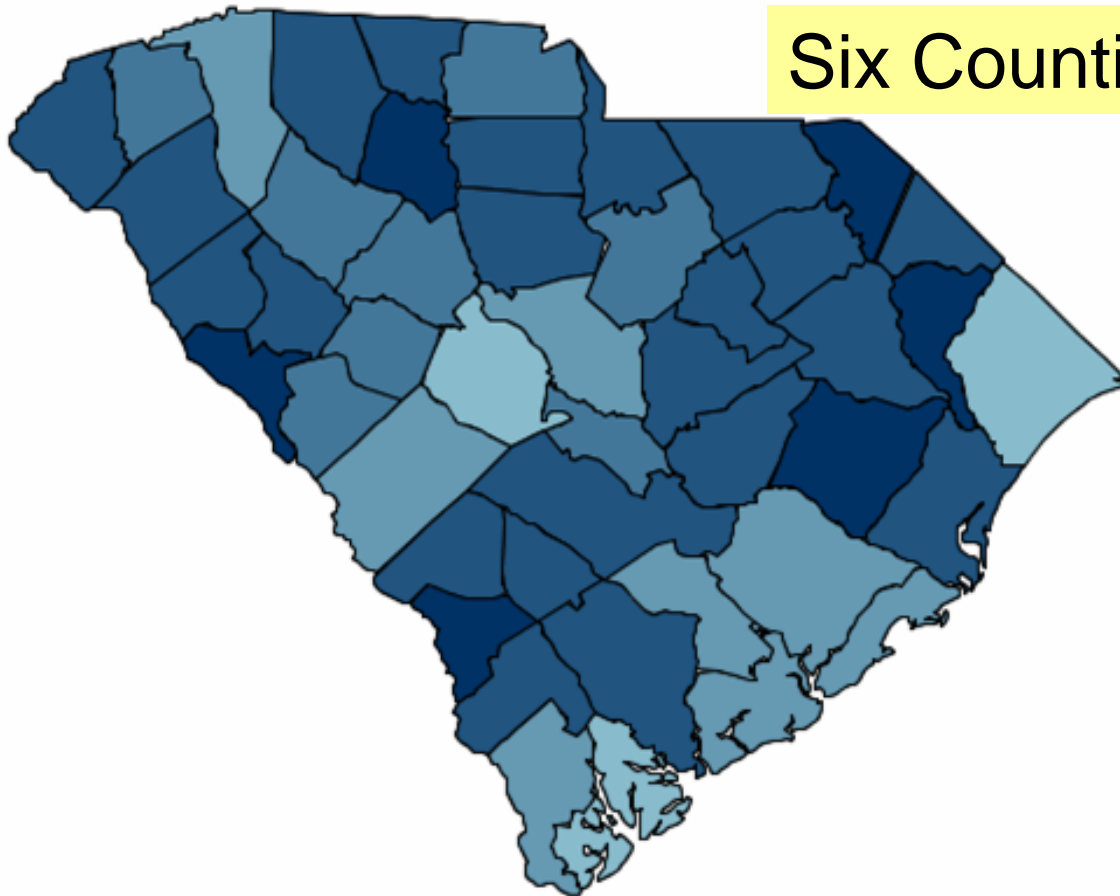


June 2005 Unemployment Rate



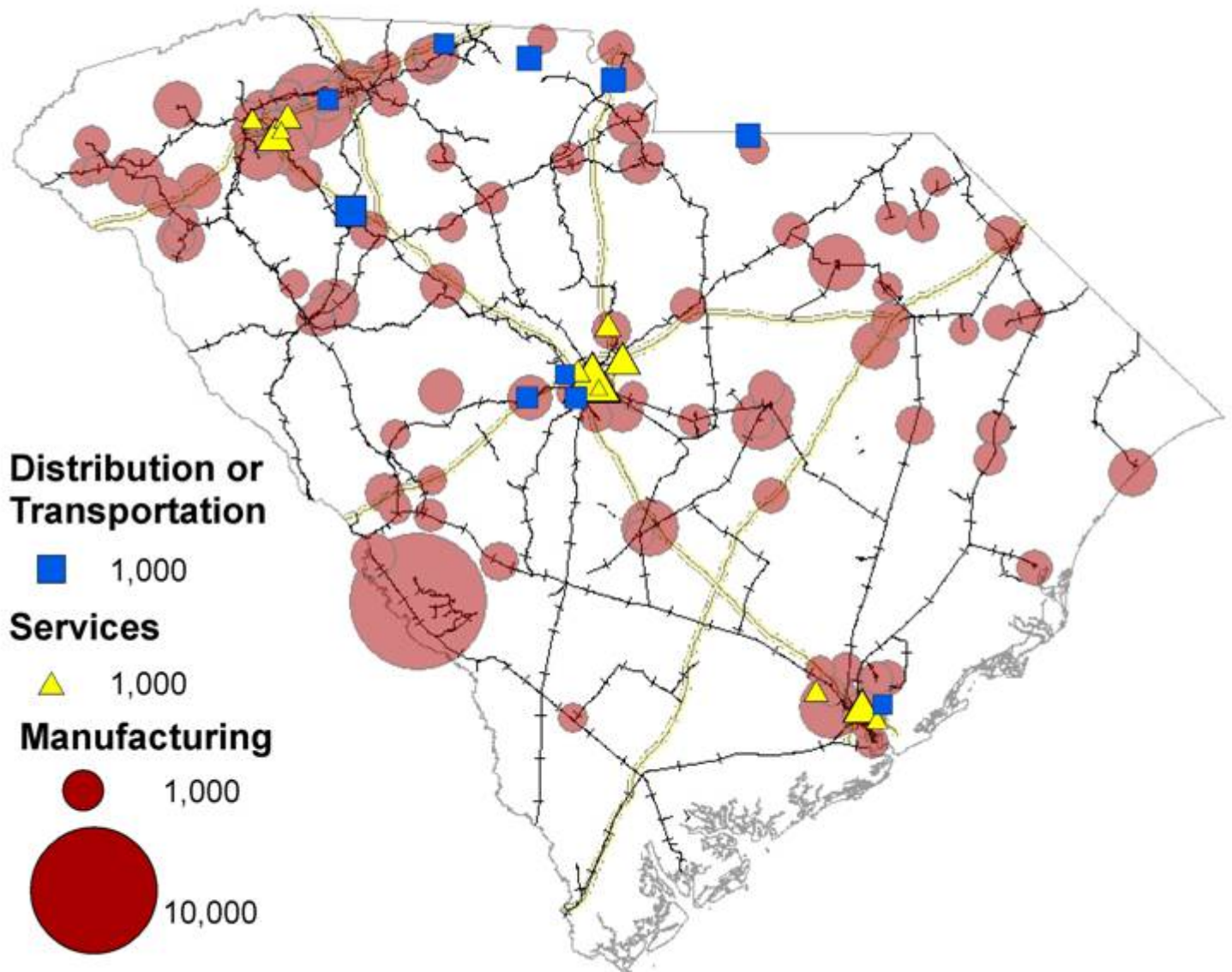
Unemployment rates by county, not seasonally adjusted, South Carolina June 2005

Six Counties > 10%



Source: U.S. Bur of Labor Statistics

Employers with 500 or More Employees



Source: S.C. Dept. of Commerce

Industry Employment 2000 - 2010



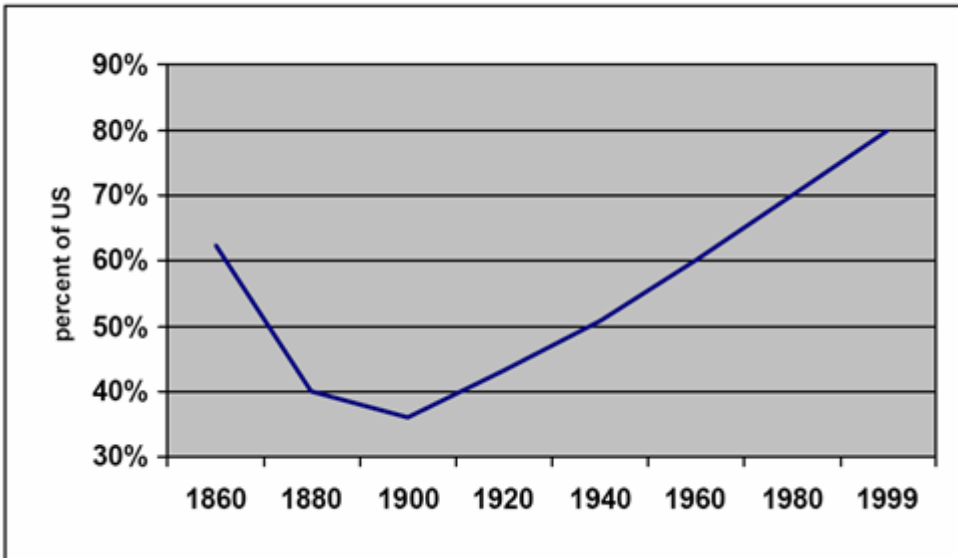
Industry Employment in South Carolina (2000, 2010)

Industry Title	2000		2010		Change	
	Base Employment	Percent Employment	Projected Employment	Percent Employment	Employment	Percent
TOTAL, ALL INDUSTRIES	1,968,334	100.00	2,267,874	100.00	299,540	15.22
AGRICULTURE, FORESTRY, & FISHING	20,199	1.03	24,094	1.06	3,895	19.28
MINING	1,832	0.09	1,819	0.08	-13	-0.71
CONSTRUCTION	113,064	5.74	126,944	5.60	13,880	12.28
MANUFACTURING	345,143	17.53	336,518	14.84	-8,625	-2.50
DURABLE GOODS	159,808	8.12	169,591	7.48	9,783	6.12
NONDURABLE GOODS	185,335	9.42	166,927	7.36	-18,408	-9.93
TRANSPORTATION AND PUBLIC UTILITIES	101,865	5.18	119,841	5.28	17,976	17.65
WHOLESALE AND RETAIL TRADE	440,476	22.38	496,634	21.90	56,158	12.75
WHOLESALE TRADE	80,620	4.10	89,516	3.95	8,896	11.03
RETAIL TRADE	359,856	18.28	407,118	17.95	47,262	13.13
FINANCE, INSURANCE, AND REAL ESTATE	79,453	4.04	87,684	3.87	8,231	10.36
SERVICES	731,583	37.17	910,235	40.14	178,652	24.42
GOVERNMENT*	131,130	6.66	141,786	6.25	10,656	8.13
<i>Federal Government</i>	<i>22,503</i>	<i>1.14</i>	<i>21,250</i>	<i>0.94</i>	<i>-1,253</i>	<i>-5.57</i>
<i>State Government</i>	<i>51,469</i>	<i>2.61</i>	<i>56,746</i>	<i>2.50</i>	<i>5,277</i>	<i>10.25</i>
<i>Local Government</i>	<i>57,158</i>	<i>2.90</i>	<i>63,790</i>	<i>2.81</i>	<i>6,632</i>	<i>11.60</i>

* "Total All Industries" includes employment covered under the South Carolina Employment Security Law, as well as self-employed and unpaid family workers. "Educational Services" includes state and local schools, while "Health Services" includes state and local hospitals. Therefore, "State and Local Government" excludes both schools and hospitals. "Post Offices" have been taken out of "Federal Government" and placed in "Transportation and Public Utilities." "Fishing, Hunting, and Trapping", "Tobacco", and "Nonclassified Establishments" are not reported but are included in "Total All Industries".

Source: S.C. Employment Security Commission, S.C. Labor Market Information Division.

South Carolina Per Capita Income Relative to the US With Poverty Levels



1999 = 87%

Source: A Profile of the Diversified South Carolina Economy
Dr. Donald Schunk and Dr. Douglas Woodward
Division of Research
The Darla Moore School of Business

Living In Poverty	Area	Number	Percent
All Ages	United States	34,569,951	12.1
	South Carolina	567,660	14.0
Age 0-17 in poverty, 2002	United States	12,132,645	16.7
	South Carolina	197,513	19.4
Under age 5 in poverty, 2002	United States	3,727,193	19.0
	South Carolina	61,636	22.5
Median household income, in dollars, 2002	United States		\$42,409
	South Carolina		\$37,442

More than
500,000 live
In Poverty

More than
1 of every 5
Under 5 years!

Source: Census

Median Income Decline \$485 2002 - 2004



Table 9.
Income of Households by State Using 2- and 3-Year-Average Medians: 2002 to 2004

(Income in 2004 dollars)

State	3-year average ¹ 2002–2004 (dollars)		2-year average ² (dollars)				Changes in median income (2003–2004 average less 2002–2003 average)	
			2002–2003		2003–2004			
	Median income	90-percent confidence interval ³ (±)	Median income	90-percent confidence interval ³ (±)	Median income	90-percent confidence interval ³ (±)	Dollars	Percentage change
United States	44,473	208	44,514	230	44,436	263	–79	–0.2
South Carolina	39,326	1,328	39,615	1,648	39,130	1,466	–485	–1.2
South Dakota	40,518	1,162	40,183	1,373	40,887	1,368	704	1.8
Tennessee	38,550	1,328	38,714	1,608	38,377	1,542	–337	–0.9
Texas	41,275	753	41,249	933	40,826	905	–423	–1.0
Utah	50,614	1,164	50,436	1,445	50,785	1,240	348	0.7
Vermont	45,692	1,228	44,795	1,269	45,955	1,571	1,160	2.6
Virginia	53,275	1,594	54,194	2,004	53,847	1,855	–347	–0.6
Washington	48,688	1,382	48,123	1,664	49,302	1,707	1,180	2.5
West Virginia	32,589	1,130	32,241	1,193	33,465	1,468	*1,224	*3.8
Wisconsin	47,220	1,286	47,865	1,350	46,722	1,606	–1,143	–2.4
Wyoming	43,641	1,222	42,733	1,387	44,577	1,466	*1,844	*4.3

Occupations 2012 – Gainers



Occupations with Projected greater than 1,000 Employee Growth 2002 - 2012

Title	2002 Employment	2012 Employment	Numeric Employment Change	Percent Employment Change	Average Annual Openings
Total, All Occupations	1,384,180	1,525,320	141,140	10	54,090
Retail Salespersons	56,330	62,960	6,630	12	2,770
Combined Food Preparation and Serving Workers, Including Fast	27,380	33,710	6,340	23	1,830
Cashiers	56,720	63,000	6,290	11	3,420
Waiters and Waitresses	33,660	39,130	5,470	16	2,300
Registered Nurses	32,830	36,690	3,870	12	1,070
General and Operations Managers	24,280	27,830	3,540	15	860
Postsecondary Teachers	4,920	8,100	3,170	64	430
Customer Service Representatives	16,450	19,590	3,140	19	570
Truck Drivers, Heavy and Tractor-Trailer	23,670	26,440	2,760	12	700
Medical Assistants	6,170	8,920	2,750	45	390
Elementary School Teachers, Except Special Education	6,600	9,250	2,650	40	410
Food Preparation Workers	13,980	16,470	2,500	18	770
Child Care Workers	11,050	13,480	2,430	22	550
Teacher Assistants	5,190	7,480	2,300	44	330
Home Health Aides	7,360	9,590	2,230	30	320
Secondary School Teachers, Except Special and Vocational Edu	4,960	7,150	2,190	44	360
First-Line Supervisors/Managers of Retail Sales Workers	28,760	30,830	2,070	7	820
Personal and Home Care Aides	7,460	9,470	2,010	27	320
Maids and Housekeeping Cleaners	16,970	18,920	1,940	11	580
Maintenance and Repair Workers, General	17,580	19,450	1,870	11	600
Cooks, Restaurant	11,060	12,860	1,800	16	520
Receptionists and Information Clerks	8,280	10,010	1,730	21	390
Truck Drivers, Light or Delivery Services	10,840	12,550	1,710	16	290
Janitors and Cleaners, Except Maids and Housekeeping Cleaner	11,200	12,900	1,700	15	410
Preschool Teachers, Except Special Education	4,980	6,600	1,620	33	220
Sales Representatives, Wholesale and Manufacturing, Except T	14,230	15,830	1,600	11	570
Landscaping and Groundskeeping Workers	7,360	8,900	1,550	21	320
First-Line Supervisors/Managers of Food Preparation and Serv	9,440	10,870	1,430	15	370
Automotive Service Technicians and Mechanics	10,030	11,360	1,340	13	410
Welders, Cutters, Solderers, and Brazers	4,860	6,150	1,290	27	270
Nursing Aides, Orderlies, and Attendants	31,390	32,660	1,270	4	550
Sales Managers	4,460	5,670	1,210	27	210
Special education teachers	1,900	3,000	1,100	58	160
First-Line Supervisors/Managers of Production and Operation	11,950	13,040	1,090	9	440
Amusement and Recreation Attendants	3,630	4,700	1,070	30	210
Dental Assistants	3,160	4,180	1,030	33	190
Fitness Trainers and Aerobics Instructors	2,040	3,040	1,010	50	150
Property, Real Estate, and Community Association Managers	3,680	4,690	1,010	28	170

Source: S.C. Employment Security Commission

Top Jobs

Retail + 6,630

Food Prep + 6,340

Cashiers + 6,290

Waiters + 5,470

Registered

Nurses + 3,870

Demand for Teachers

- Post Secondary + 3,170
- Elementary + 2,650
- Teach Assistants + 2,300
- Secondary + 2,190
- Preschool + 1,620
- Special Ed + 1,100

Relative Wage Rates



Wage Rates - SC, NC, Georgia and US				
Occupational Categories	South	North	Georgia	United
	Carolina	Carolina		States
Managers and Executives	\$54,940	\$63,450	\$68,820	\$68,190
Architecture and Engineering	\$53,000	\$49,690	\$50,690	\$54,060
Legal	\$52,590	\$63,410	\$59,450	\$68,930
Computer and Mathematical	\$48,430	\$59,370	\$56,310	\$58,050
Healthcare Practitioners, Technologists, and Technicians	\$46,760	\$46,740	\$44,810	\$47,990
Life, Physical, and Social Sciences	\$41,870	\$44,970	\$44,130	\$47,790
Business and Financial Operations	\$39,540	\$45,780	\$47,720	\$48,470
Education, Training and Library	\$33,640	\$33,000	\$35,490	\$37,900
Arts, Design, Entertainment, Sports, and Media	\$31,590	\$34,040	\$33,920	\$38,640
Installation, Maintenance, Repair – Mechanics, Technicians	\$31,040	\$31,890	\$33,470	\$33,760
Community and Social Services	\$27,760	\$29,580	\$32,480	\$32,910
Construction and Skilled Trades	\$27,320	\$27,490	\$29,390	\$34,440
Production – Assemblers, Machine Operators, etc	\$25,610	\$24,360	\$24,220	\$26,450
Protective Services – Fire, Police, Corrections, Security	\$24,030	\$26,890	\$25,300	\$30,780
Sales – Wholesale, Retail, Real Estate, Services, etc	\$23,490	\$26,260	\$27,550	\$27,990
Office and Administrative Support	\$23,220	\$24,880	\$25,640	\$26,300
Transportation and Material Moving – Air, Rail, Truck, etc	\$23,100	\$23,950	\$25,880	\$25,630
Farming, Fishing, and Forestry	\$20,610	\$21,980	\$19,070	\$18,860
Healthcare Aides and Assistants	\$19,560	\$19,330	\$19,410	\$21,040
Personal Care and Service	\$18,400	\$18,090	\$22,120	\$20,510
Building and Grounds – Cleaning and Maintenance	\$17,220	\$17,900	\$17,730	\$19,570
Food Preparation and Serving	\$14,890	\$15,340	\$15,420	\$16,070
All Occupations	\$28,420	\$30,197	\$31,508	\$32,890

S.C. Consistently Lower
Than N.C. or Georgia
Often several thousand dollars

All

S.C. \$28,420

N.C. \$30,197

GA \$31,508

Computer

S.C. \$48,430

N.C. \$59,370

GA \$56,310

SOUTH CAROLINA COMPETITIVENESS INITIATIVE:

Strategic Plan



Exhibit 31: Principal Challenges Facing South Carolina

Distribution of Economic Performance	<ul style="list-style-type: none">■ Deep poverty in numerous rural counties■ Much lower level of prosperity among African-Americans
Economic Composition	<ul style="list-style-type: none">■ Difficult environment for start-ups and small firms■ Lack of focus on growing existing companies
Clusters	<ul style="list-style-type: none">■ Little depth of clusters■ Limited interaction among cluster members
Education and Workforce	<ul style="list-style-type: none">■ Improving, but still under-performing K-12 system■ Relatively few highly skilled and specialized technicians■ Relatively few specialized engineers in select clusters
Physical Infrastructure	<ul style="list-style-type: none">■ Air access is relatively expensive and time-consuming
Economic Development Organizations	<ul style="list-style-type: none">■ Overlapping sales and marketing organizations■ Lack of cluster-specific institutions for collaboration■ Lack of university / college-industry institutions for collaboration
Culture and Attitudes	<ul style="list-style-type: none">■ Emphasis on dividing the pie among regions and institutions, not growing it■ Traditional reliance on government■ Low self-expectations
Research and Technology	<ul style="list-style-type: none">■ Lack of first-tier research universities

Source: SOUTH CAROLINA COMPETITIVENESS INITIATIVE: Strategic Plan



Education and Workforce

Short-Term (2004–05)

- Act as an oversight committee for Pathways to Prosperity in lieu of Coordination Council and rally efforts to pass Pathways legislation in 2005
- Develop mission relevant agendas for early childhood development, colleges & universities, & adult education
- Identify and pursue untapped financing for South Carolina's education and workforce training systems
- Research parental involvement best practices
- Develop and fund phase I communication strategy
- Re-align curricula of tech colleges and secondary schools with the needs of clusters
- Develop and publish scorecard on implementation
- Assist Council in documenting knowledge needs for business clusters that can be met by the education system

Mid-Term (2005–06)

- Create online database of education initiatives in SC; recognize best practices (in-state and out-of-state)
- Develop criteria to certify and recognize local best practices
- Establish / upgrade Regional Service Centers linking business and education
- Foster other models of business-education partnerships
- Raise awareness and accountability of schools regarding black male educational achievement
- Produce white papers on K-12 funding
- Support expansion of NFTE program
- Develop and fund phase II communication strategy, messages and materials
- Evaluate pilot programs aimed at reducing drop-out rates
- Improve articulation from K-12 to post secondary options
- Assist Council on documenting knowledge needs for business clusters that can be met by the education system
- Publish annual scorecard on implementation

Long-Term (2006+)

- Reduce drop-out rates
- Create a statewide Certificates and Apprenticeships program
- Support tech colleges in developing curriculum to commercialize ideas linked with Research Universities' centers for excellence
- Develop and fund phase III communication strategy, messages and materials
- Publish annual scorecard on implementation
- Maintain momentum and reprioritize critical items

- Clusters, Based on Michael Porter
 - Automotive
 - Chemical
 - Travel and Tourism
 - Textiles
 - Apparel
 - Agriculture

Chairman of the South Carolina Board of Economic Advisors (Rainey, 2004):

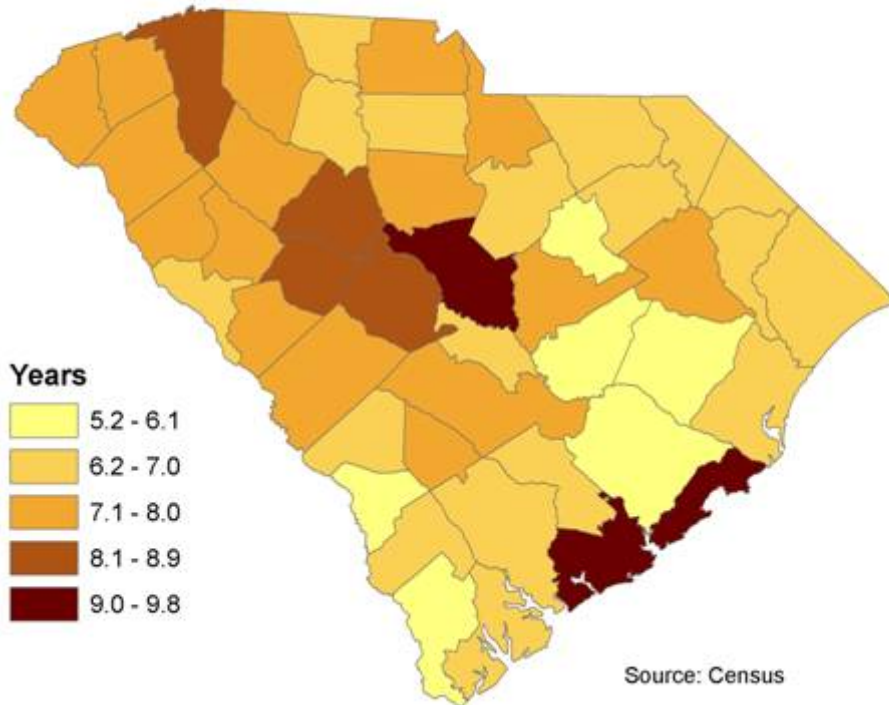


- “How can we expect children who through the simple accident of geography, live in our essential rural communities to become productive citizens if this is their lot for life? We can't. This offends our core value of fairness. Unequal funding of education is just another way of denying access to education”.

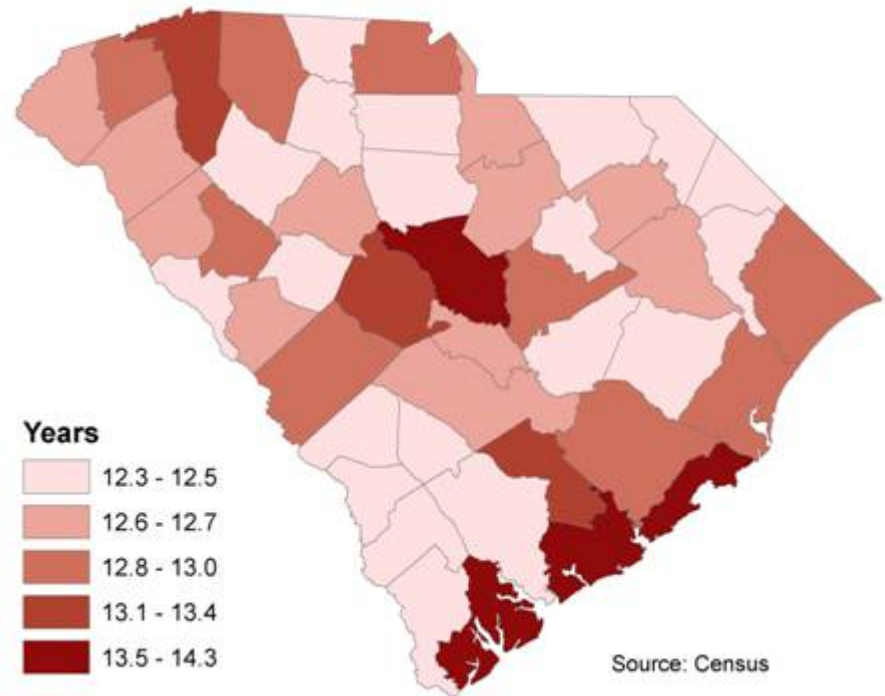
Median School Years Completed 1950 & 2000



Median School Years Completed 1950



Median School Years Completed 2000

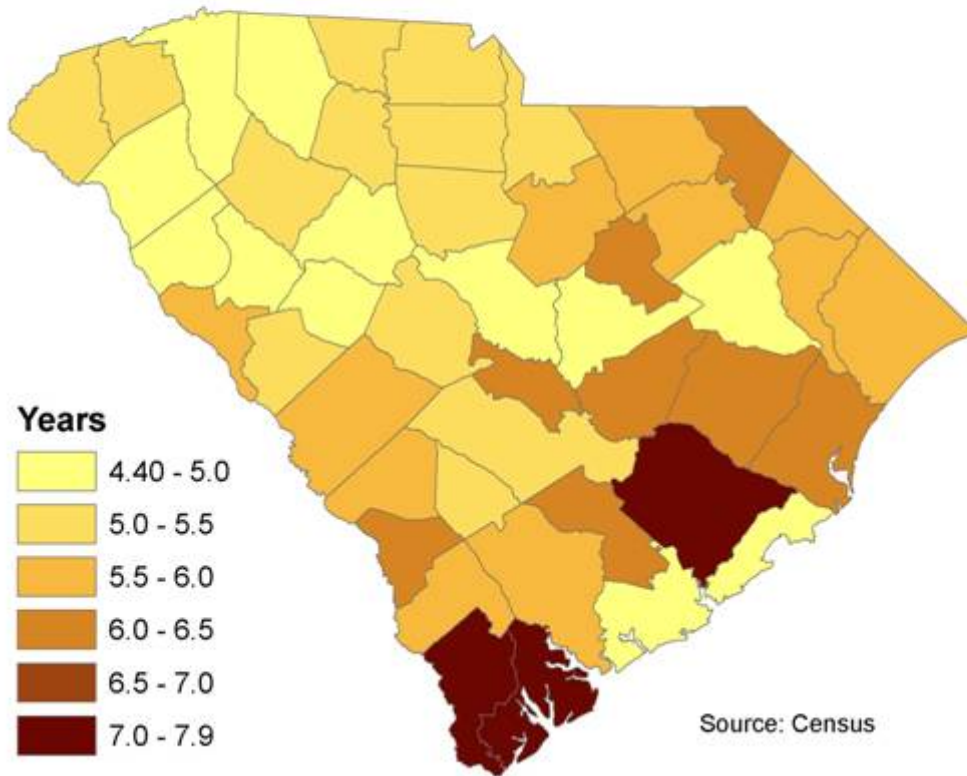


12 years means half the population
does not have a high school education !

Median School Years Completed 1950 – 2000



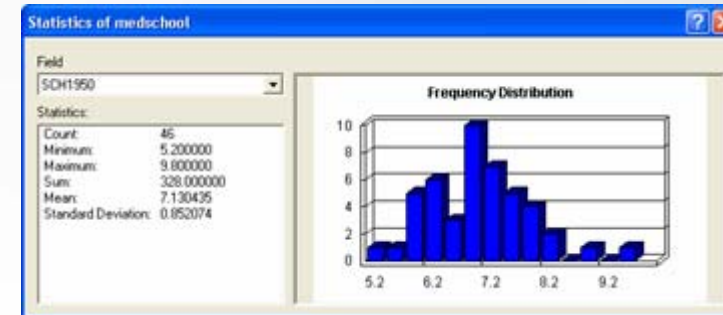
Change in Median School Years Completed 1950 - 2000



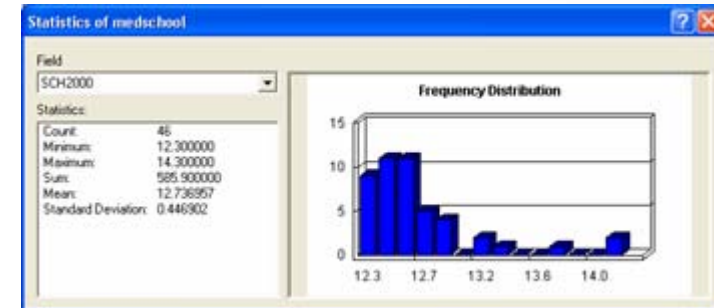
Source: Census

Average County Increase
From 7.1 to 12.7 years

1950



2000



Diversity in South Carolina School Districts



- **The size of districts ranges from 396 to 58,949 students**
- **The physical size of the districts range from 48.6 to 1,226 sq mi**
- **The density of the districts range from 3 to 182 students/sq mi**
- **The change in student enrollment from 1990 to 2000 ranges from -59% to +65%**

Diversity in South Carolina School Districts

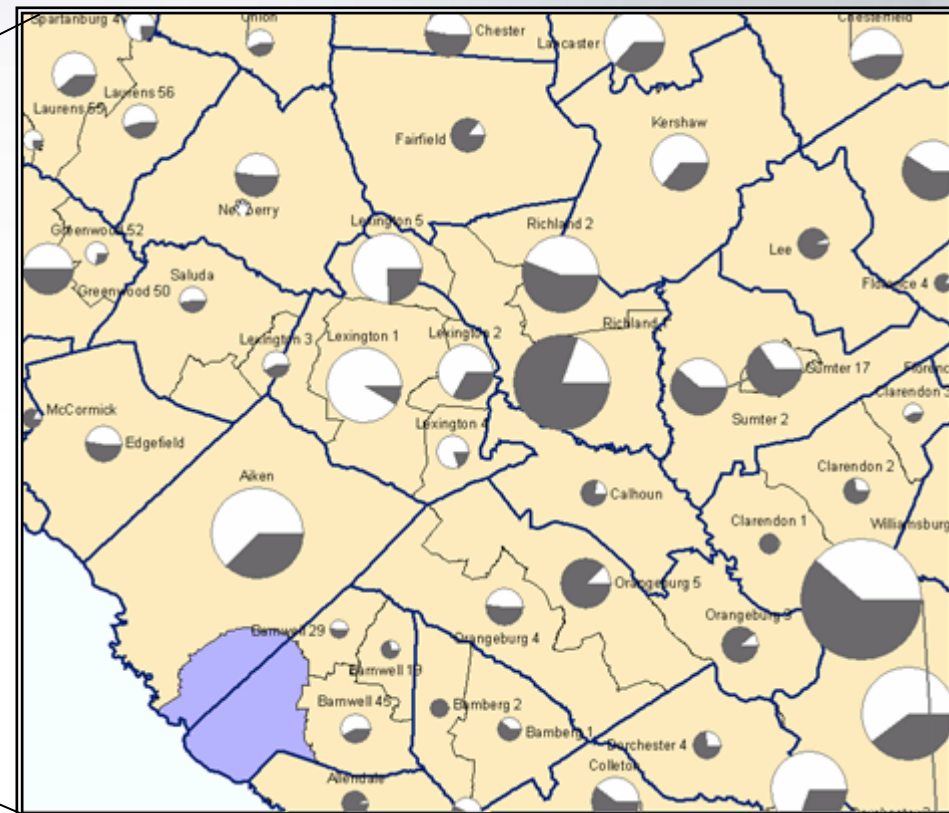
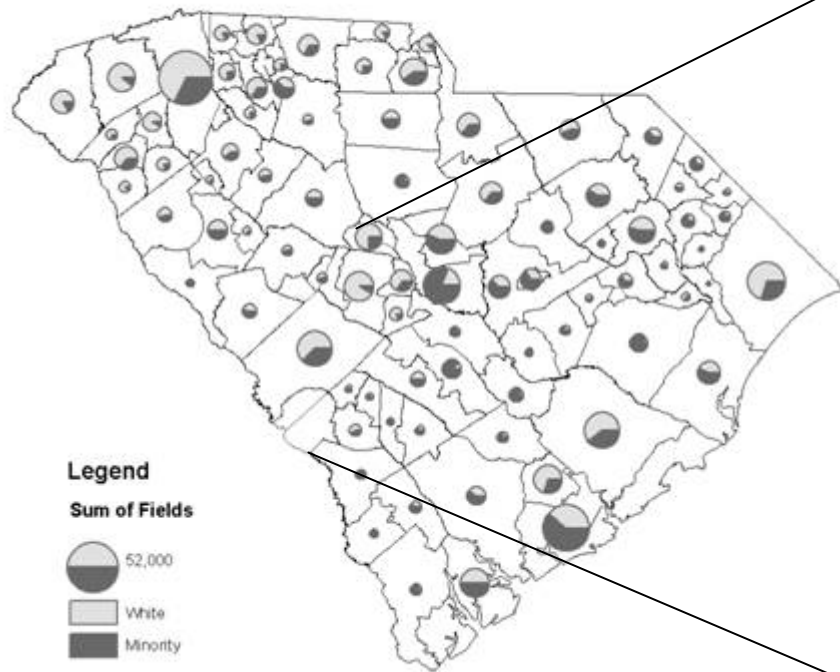


- **The cost per student ranges from \$5,330 to \$9,024**
- **The student teacher ratio ranges from 7.8 to 23.9**
- **The racial composition ranges from 7.8% minority to 98%**
- **Average teacher salaries range from \$31,068 to \$41,919**

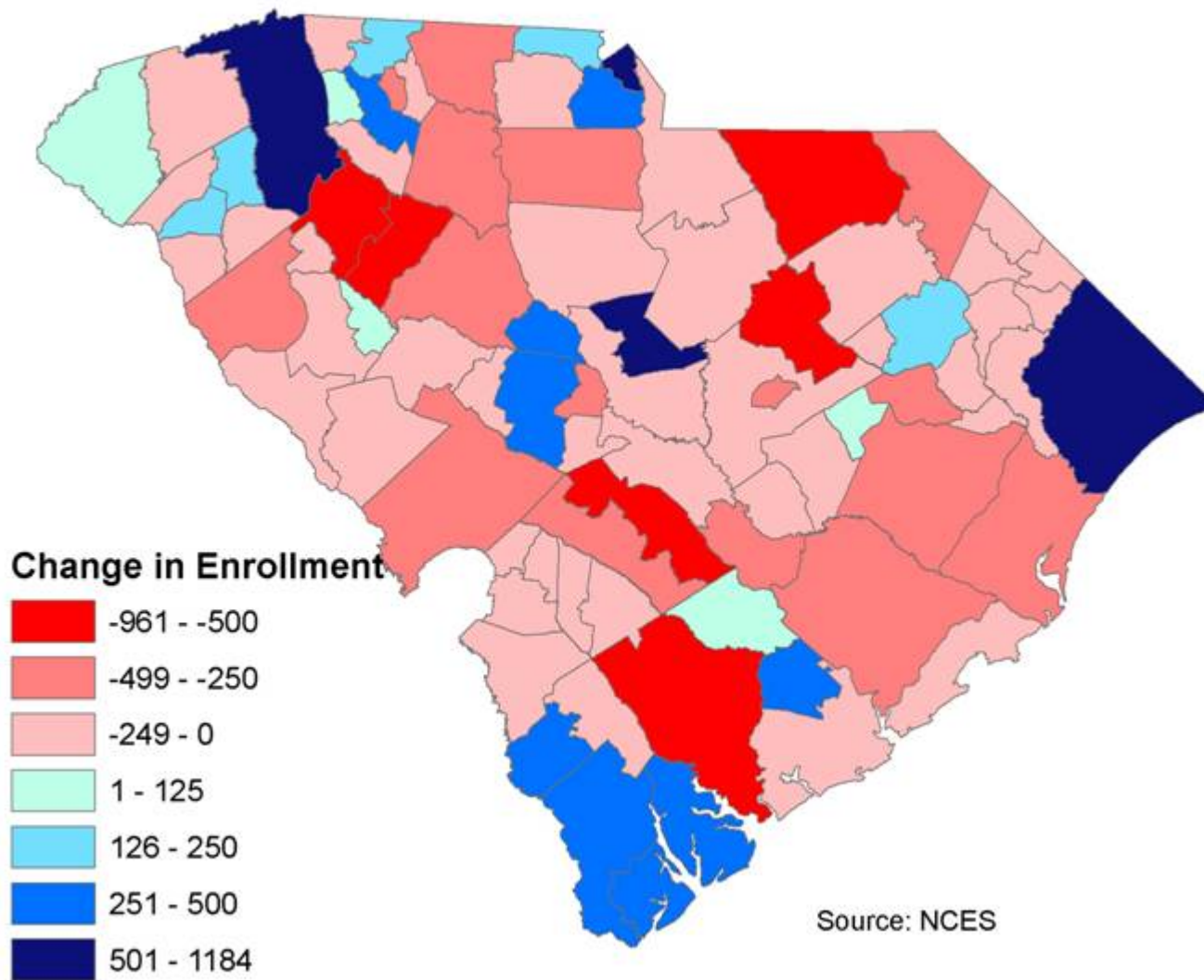
School District Enrollment



District Enrollment by Race 2001



Change in School District Enrollment 2001 - 2004



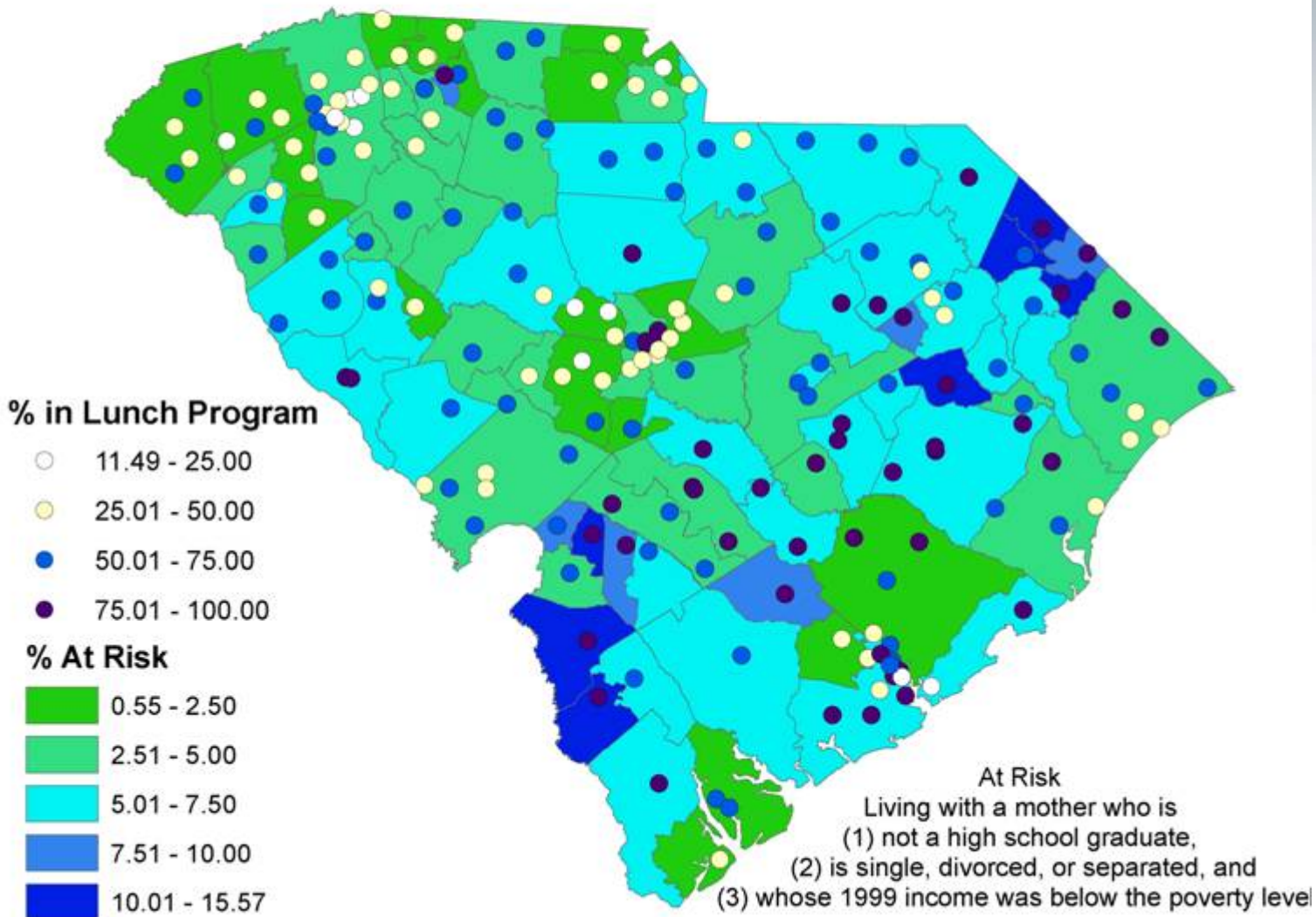
At Risk Children



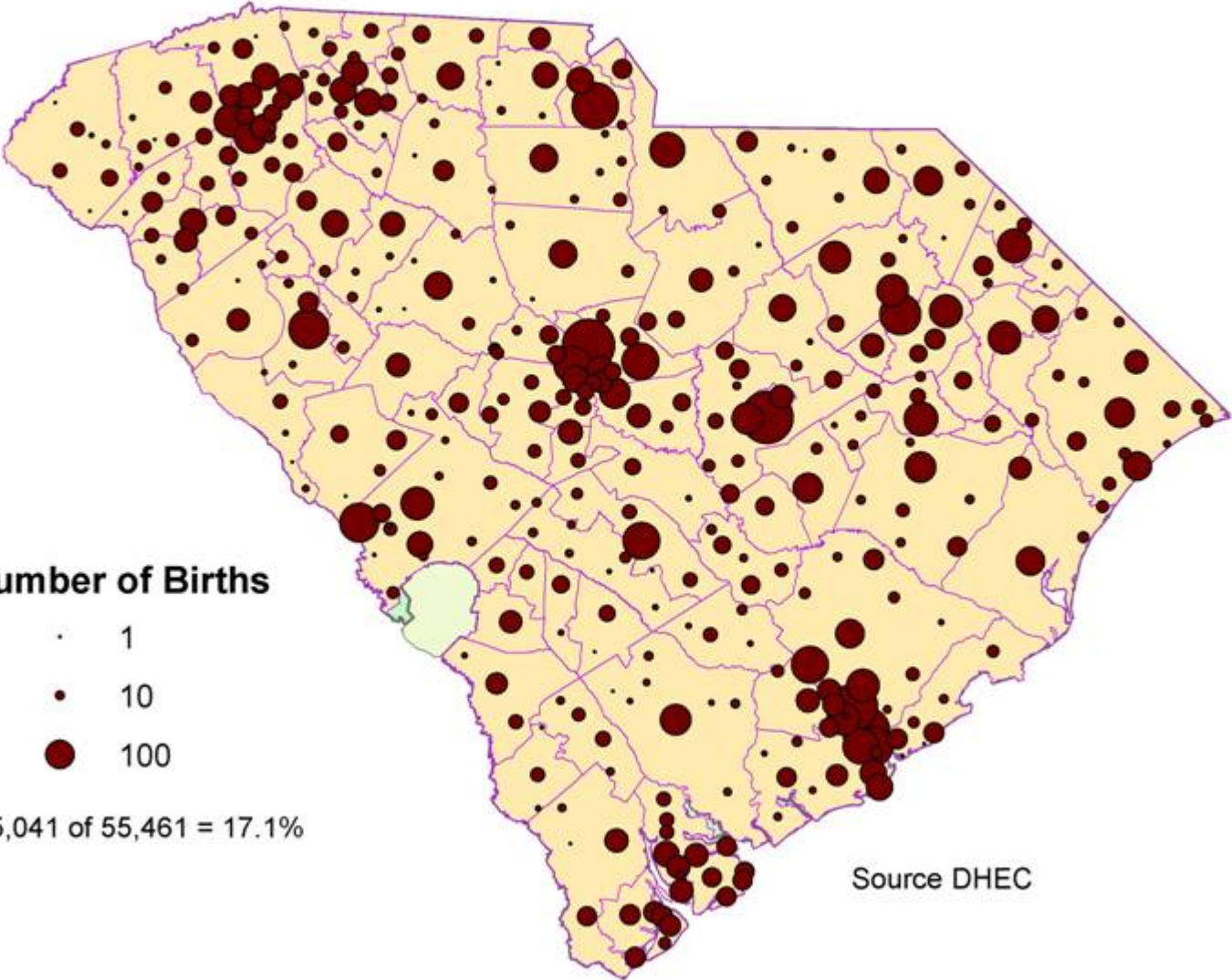
- Living with a mother who is
 - (1) not a high school graduate,
 - (2) is single, divorced, or separated, and
 - (3) whose 1999 income was below the poverty level.

Children at Risk

H.S. Children on Free Lunch Program



2003 Births to Unwed Mothers by Zip code With School District Boundaries



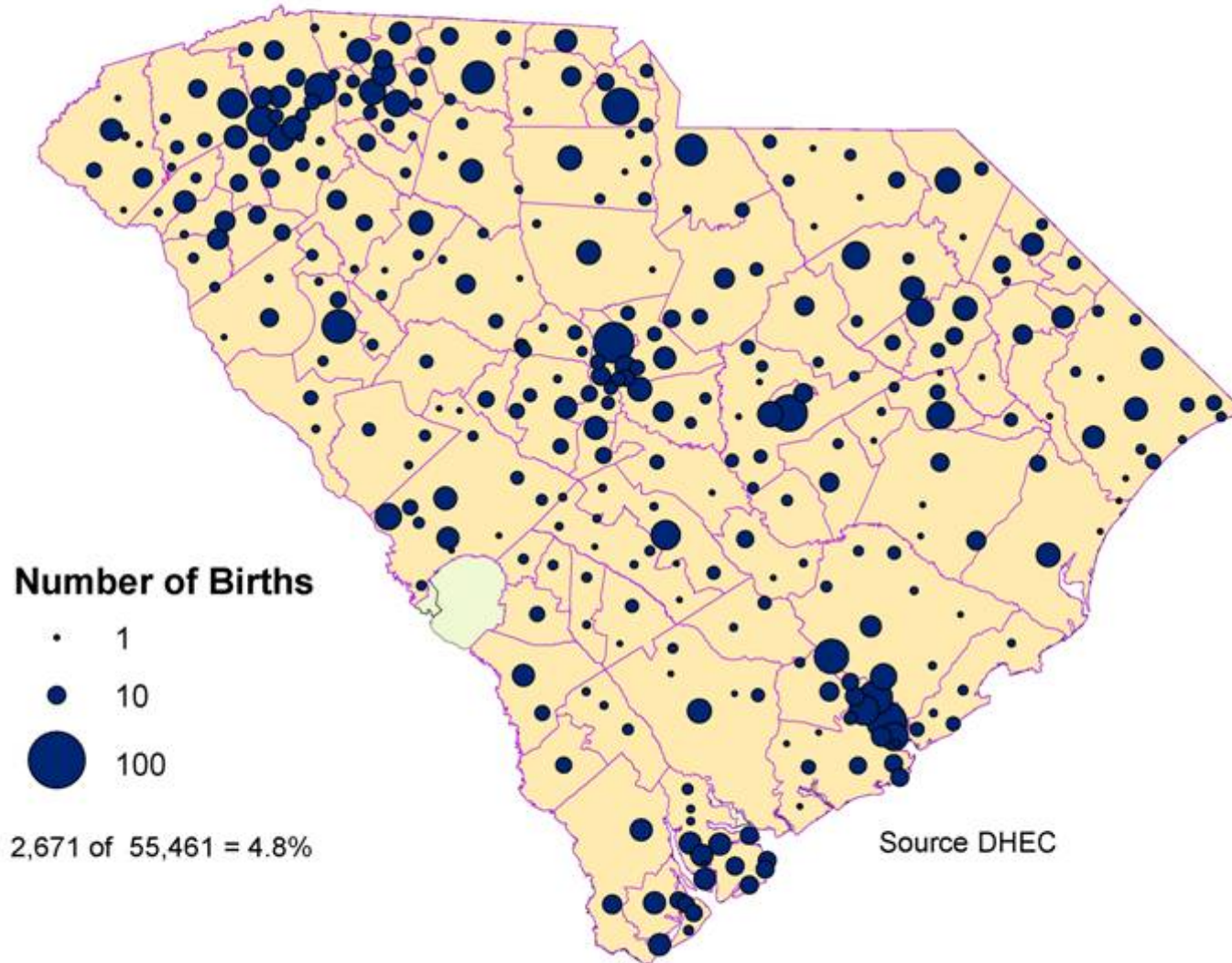
Number of Births

- 1
- 10
- 100

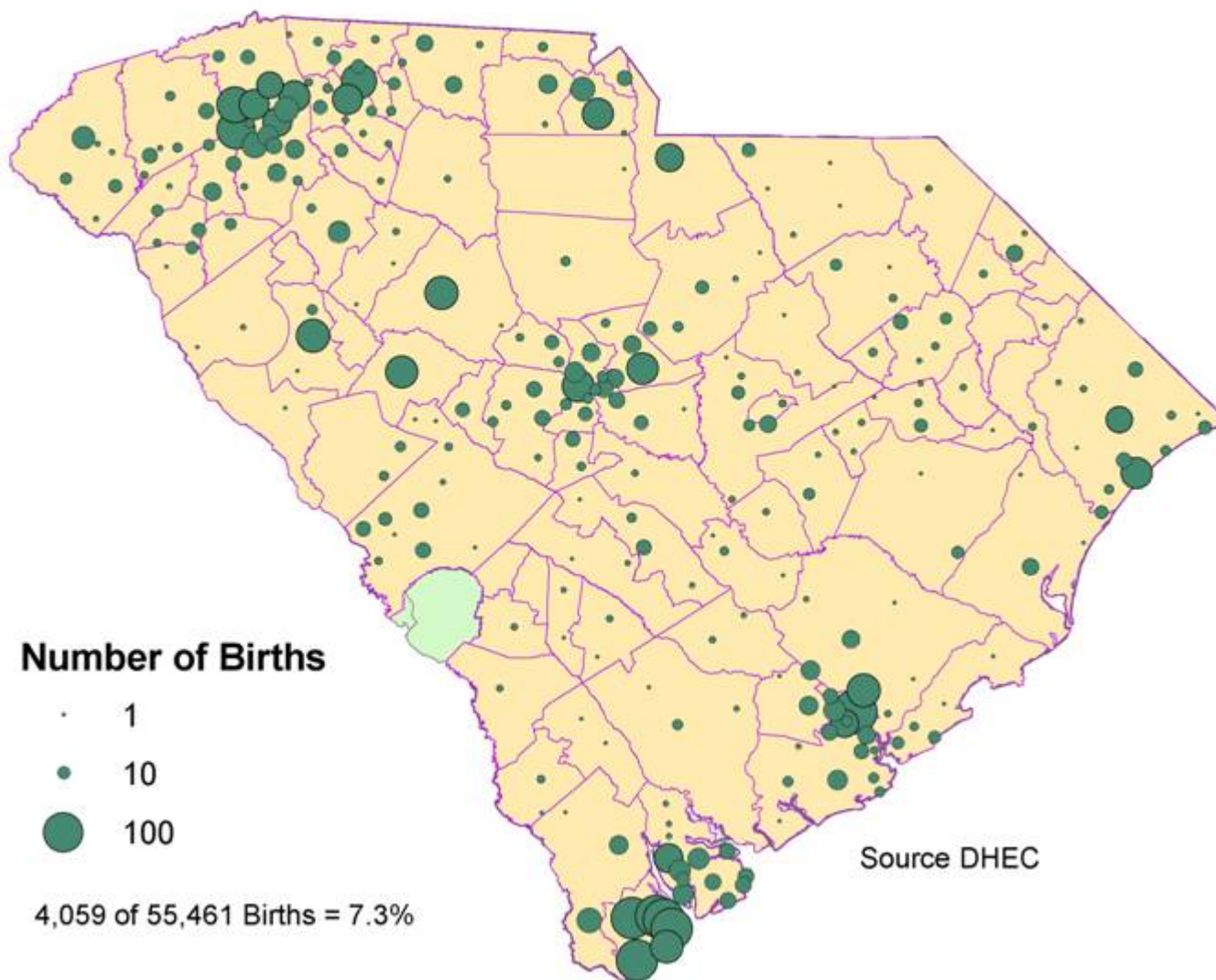
15,041 of 55,461 = 17.1%

Source DHEC

2003 Births to Mothers Under 17 by Zip code With School District Boundaries

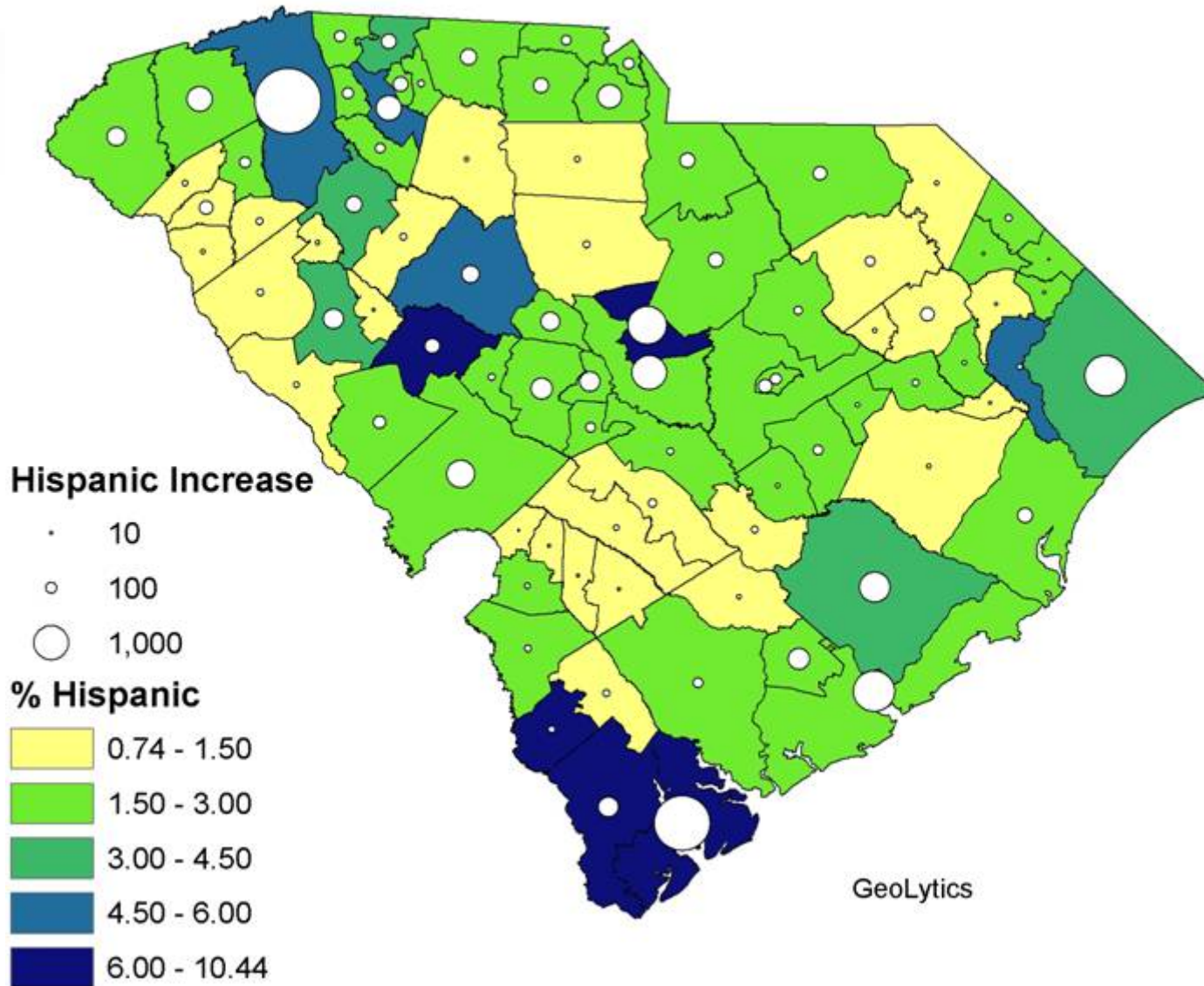


2003 Births to Hispanic Mothers With School District Boundaries

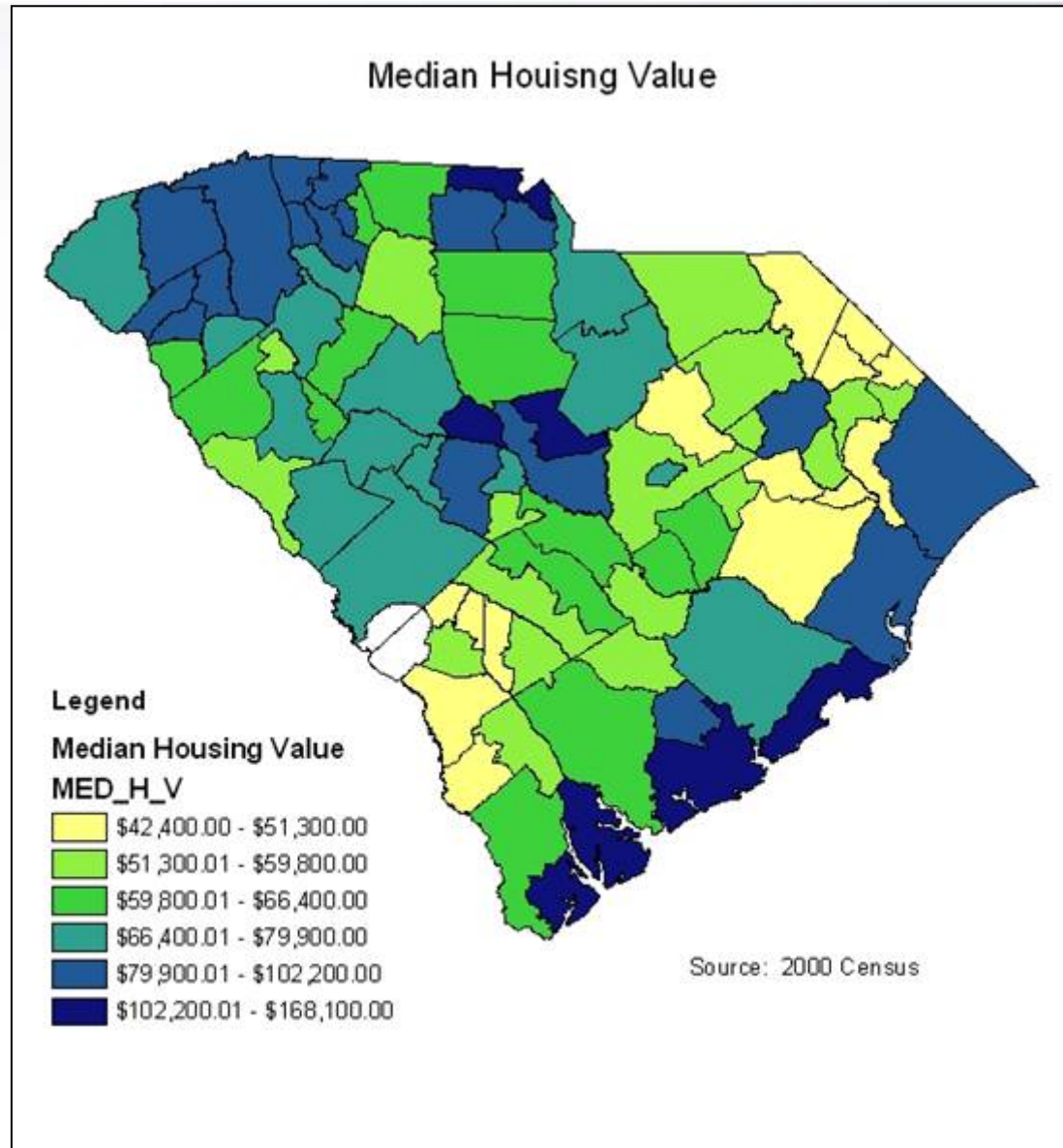


Projected Hispanic Population 2009

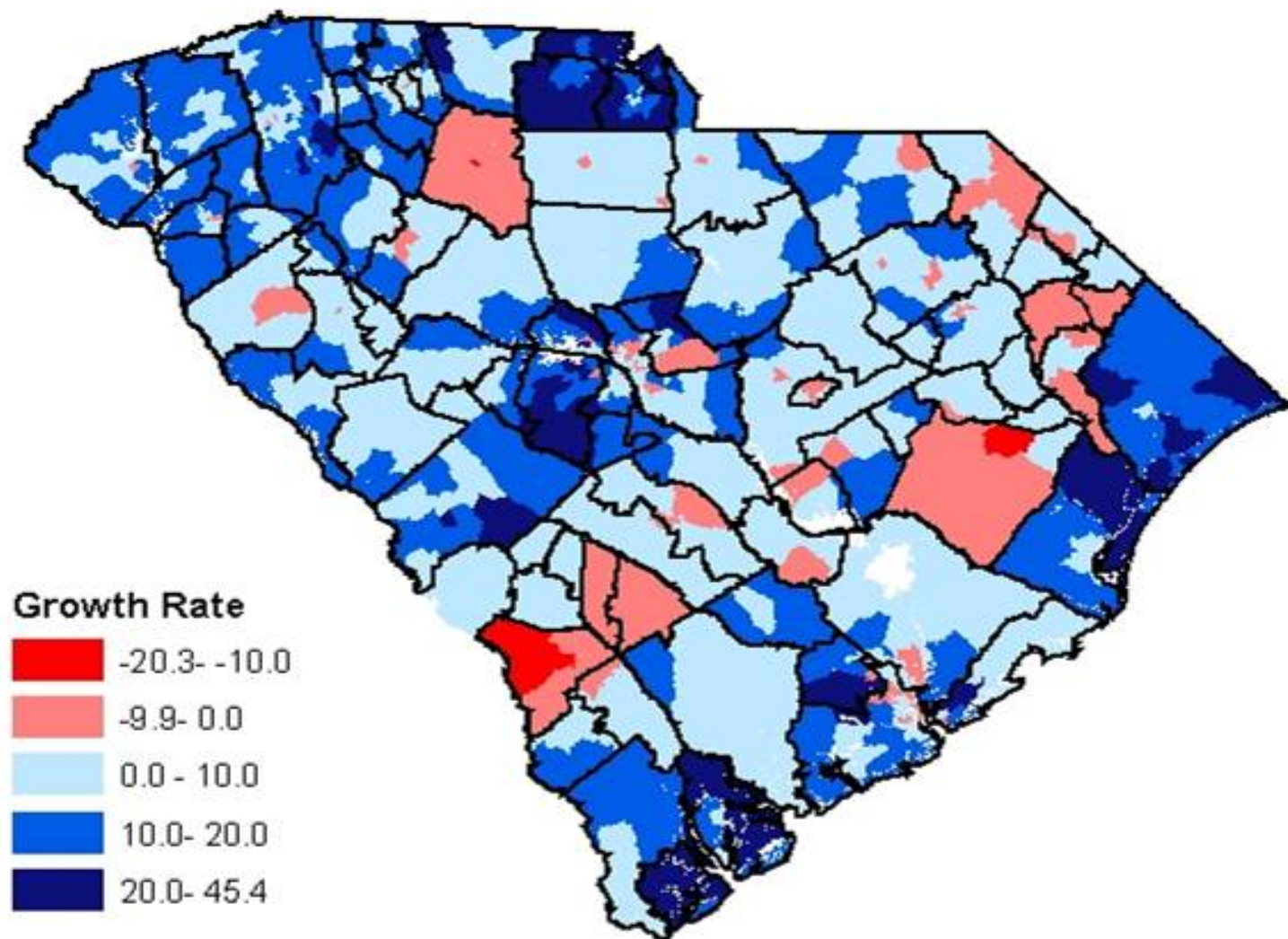
Growth Between 2000 - 2009



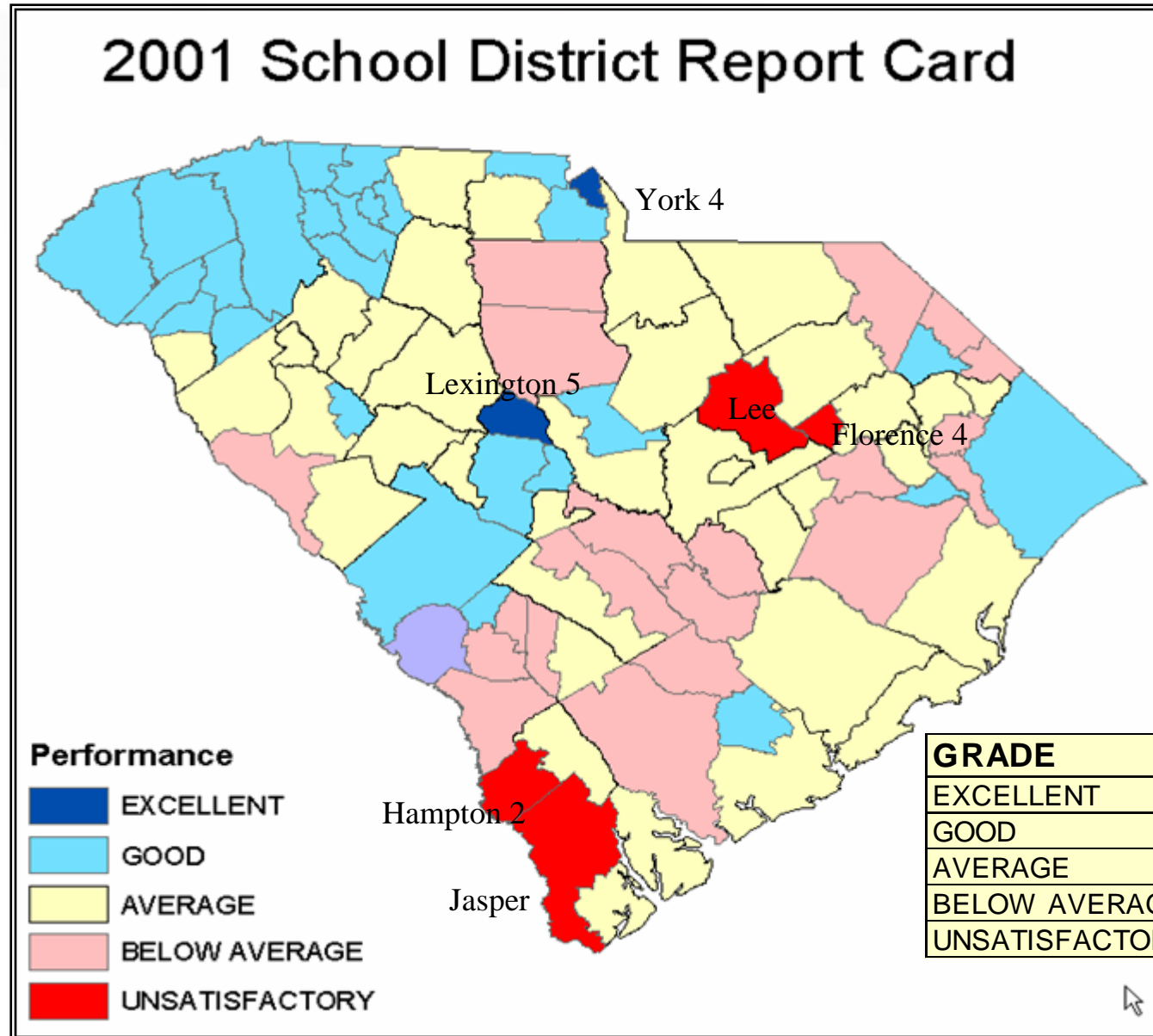
Median Housing Values – School Districts



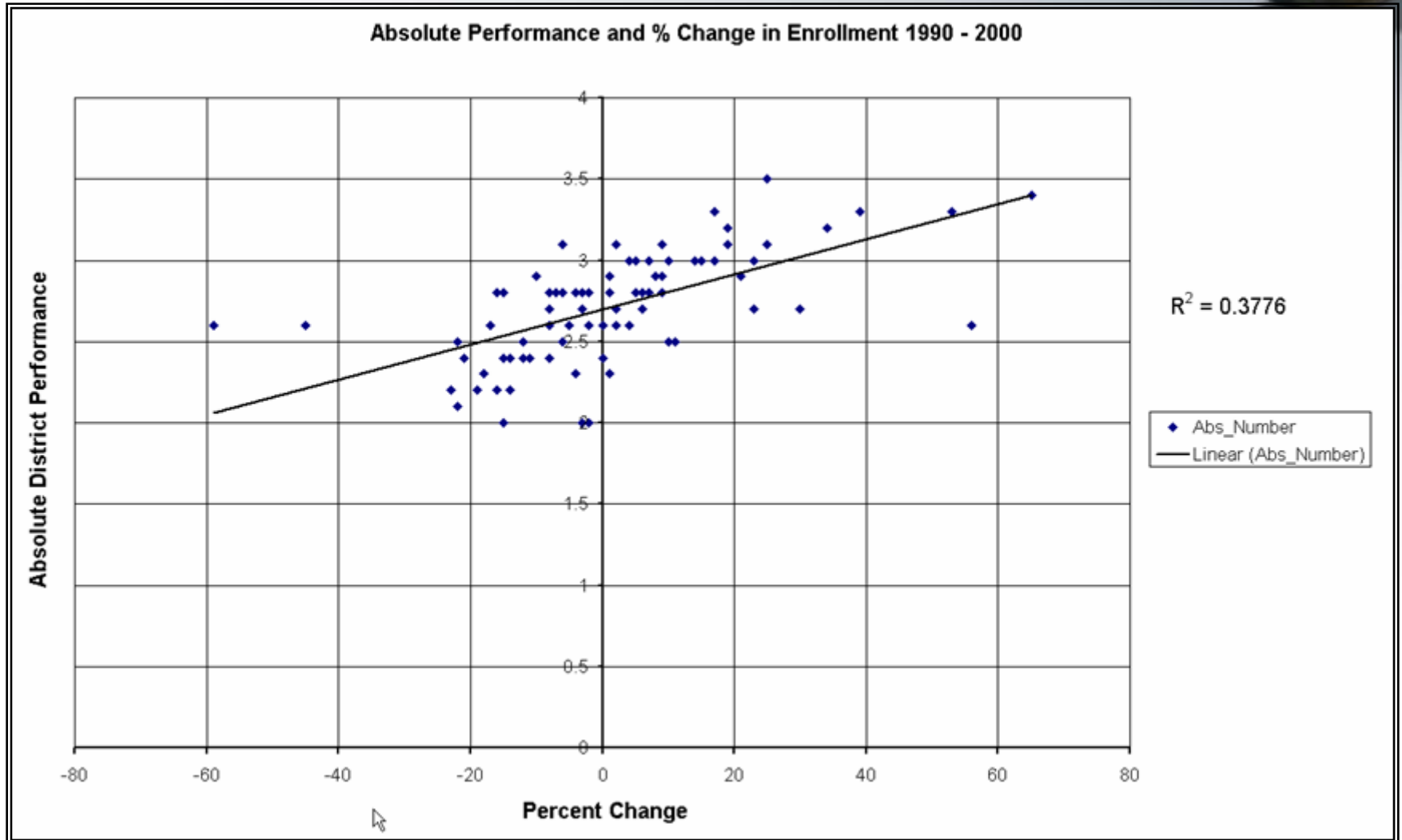
Census Tract Population Growth Rate Forecast 2000 - 2009 With School Districts



Report Cards



Performance impacts Enrollment



Local Financial Resources



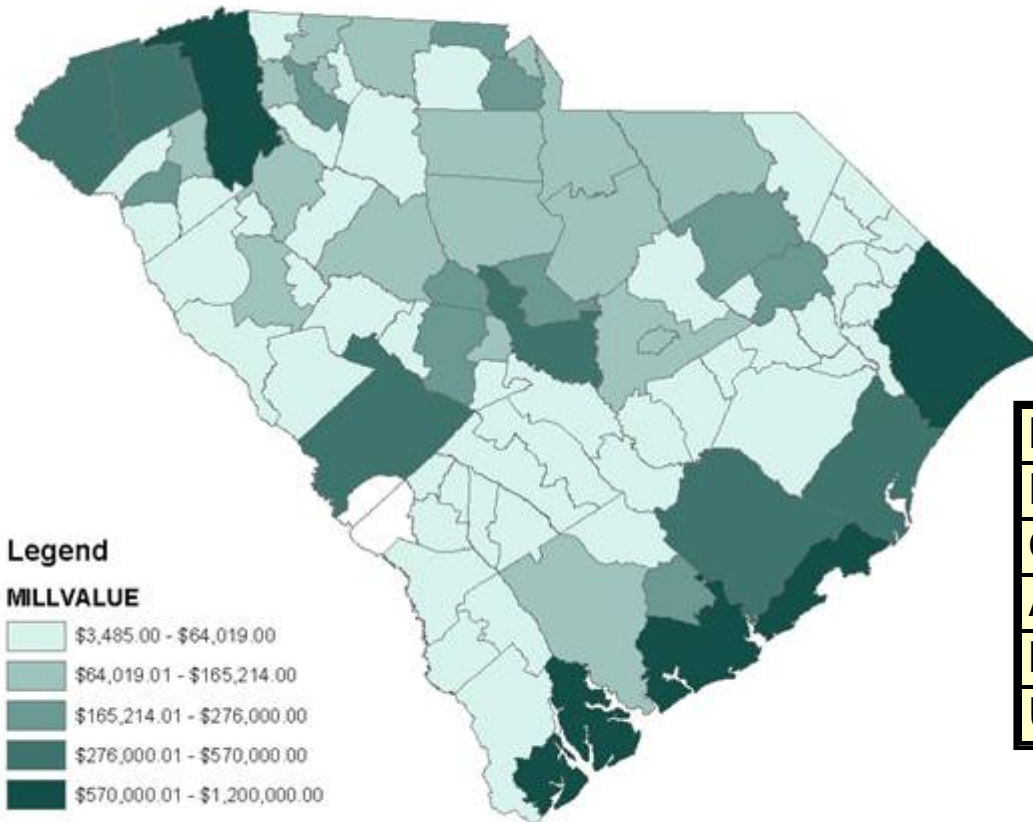
District Grade	Mill Value	Ability to Pay	Tax Effort	% Local Budget
EXCELLENT	\$175,244	0.0137	1.1495	41.00%
GOOD	\$215,857	0.0179	1.1198	39.62%
AVERAGE	\$151,743	0.0125	1.0949	30.76%
BELOW AVERAGE	\$43,106	0.0038	1.2119	31.25%
UNSATISFACTORY	\$22,677	0.0019	1.0522	25.00%

Excellent districts having **mileage values eight times** that of the unsatisfactory districts. The biggest factors are the economic base or property values within the district. It is not the effort. In fact, the greatest effort is found in the districts with below average schools. They just don't have the assets to support the schools and hire good teachers.

Local Tax Base Impacts Performance



Revenue Generated Per Mill of Property Tax



District Grade	Mill Value
EXCELLENT	\$175,244
GOOD	\$215,857
AVERAGE	\$151,743
BELOW AVERAGE	\$43,106
UNSATISFACTORY	\$22,677

Salaries and Qualifications Matter



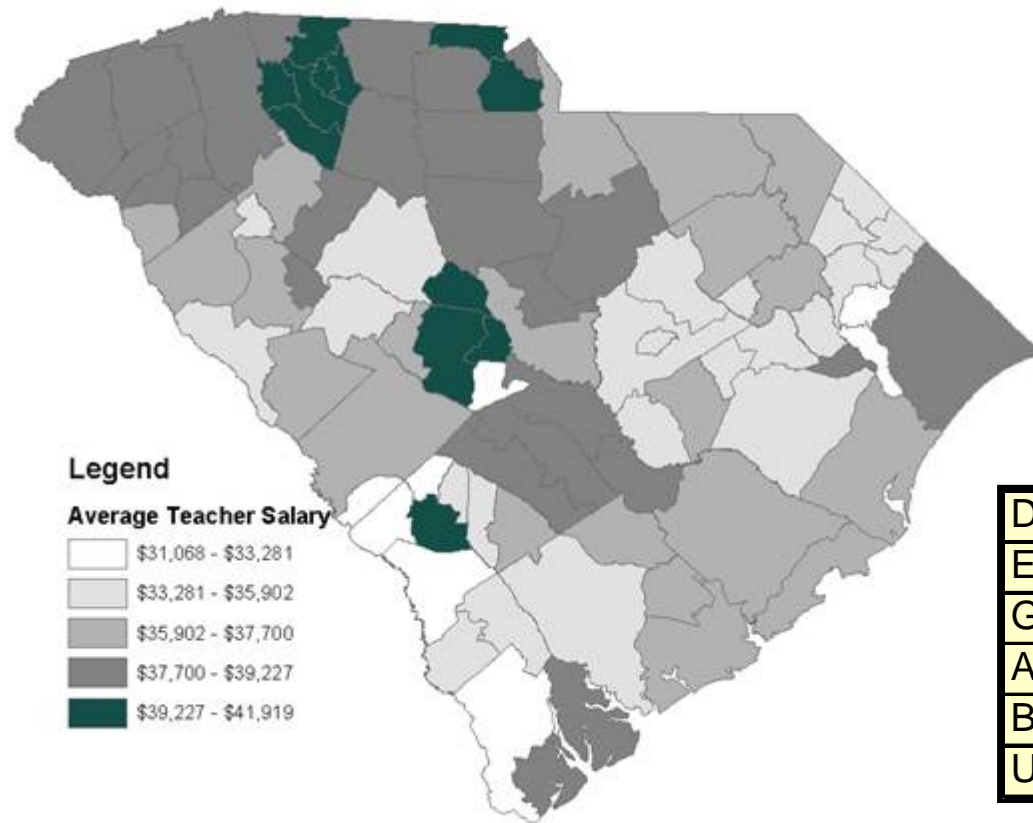
District Grade	% Parent Attending Conferences	Drop Out Rate	Student Teacher Ratio	% Masters	Ave Teacher Salary
EXCELLENT	76.80%	1.9000	21.8500	50.3500	\$39,408
GOOD	80.24%	2.4846	20.7615	40.6615	\$38,786
AVERAGE	80.12%	3.1324	19.3235	36.7441	\$36,503
BELOW AVERAGE	72.33%	3.9150	18.3250	31.9550	\$36,008
UNSATISFACTORY	60.45%	3.0500	18.4000	27.6750	\$34,210

Student / Teacher ratio are lower in the poorest performing districts

Teacher Salaries Impact Performance



Average Teacher's Salary



Legend

Average Teacher Salary

	\$31,068 - \$33,281
	\$33,281 - \$35,902
	\$35,902 - \$37,700
	\$37,700 - \$39,227
	\$39,227 - \$41,919

\$5,000 Difference

District Grade	Ave Teacher Salary
EXCELLENT	\$39,408
GOOD	\$38,786
AVERAGE	\$36,503
BELOW AVERAGE	\$36,008
UNSATISFACTORY	\$34,210

\$1,200 Per Student Difference



Expenditures Per Student					
RATING	TOTAL	INSTRUCTIONAL	LEADERSHIP	OPERATIONAL	INSTRUCTIONAL SUPPORT
Excellent	\$6,875	\$4,141	\$481	\$1,338	\$916
Good	\$6,977	\$4,114	\$584	\$1,367	\$907
Average	\$7,007	\$4,085	\$650	\$1,361	\$906
Below Avg	\$8,014	\$4,398	\$873	\$1,720	\$1,021
Unsatisfactory	\$8,005	\$4,351	\$833	\$1,735	\$1,086

+\$1200

+\$352

+ \$400

Even though the unsatisfactory districts are spending almost \$1,200 per student more than the excellent districts ***the results are terrible***. They are spending too much on fixed costs for leadership and operational costs and not enough on teacher's salaries and hiring better qualified teachers with masters degrees.

Expenditures



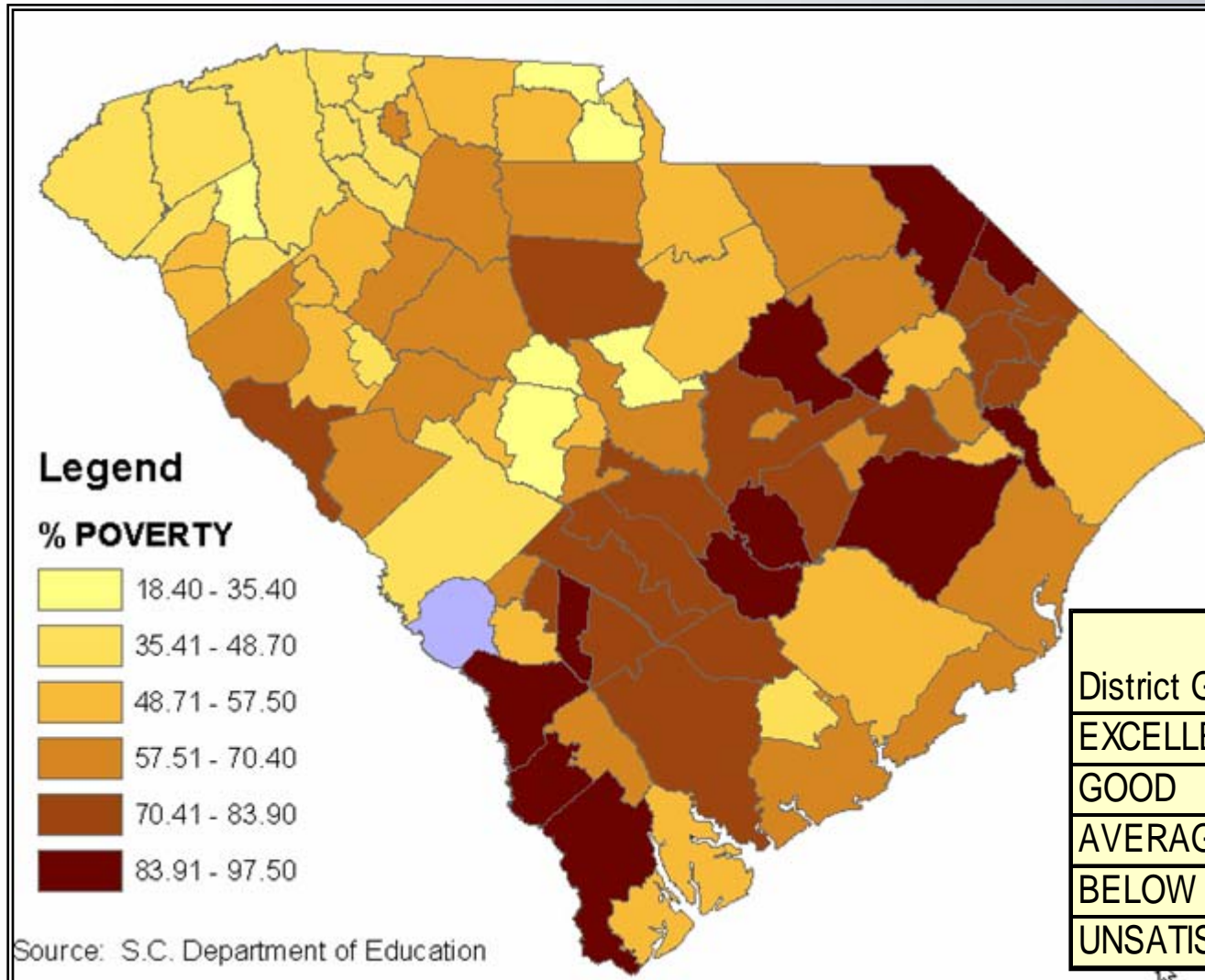
Percentage of District Expenditures

RATING	INSTRUCTIONAL	TEACHERS	LEADERSHIP	OPERATIONAL	INSTRUCTIONAL SUPPORT
Excellent	60.26%	54.20%	6.98%	19.50%	13.26%
Good	59.17%	52.35%	8.37%	19.49%	12.90%
Average	58.36%	50.24%	9.26%	19.39%	12.92%
Below Avg	55.38%	48.32%	10.73%	21.21%	12.67%
Unsatisfactory	54.38%	34.88%	10.36%	21.71%	13.54%

54% vs 35%

Better performing districts can spend a greater proportion of budget on instruction and teachers

Poverty Level Impacts Performance



District Grade	Number	% Poverty
EXCELLENT	2	30.10%
GOOD	26	45.97%
AVERAGE	34	62.80%
BELOW AVERAGE	20	82.46%
UNSATISFACTORY	4	88.73%

The Impact of Density



District Grade	Student Density Students/ Sq. Mile	Square Miles	Transportation Per Student	Net Change in Enrollment 1990 - 2000	% Change in Enrollment
EXCELLENT	93.2300	107.1	\$138	2501.0000	45.22%
GOOD	47.0615	281.0	\$147	1379.8846	13.11%
AVERAGE	22.6526	420.1	\$148	-148.7647	-1.56%
BELOW AVERAGE	9.6350	369.8	\$181	-338.0500	-9.91%
UNSATISFACTORY	7.7175	354.0	\$185	-254.2500	-10.76%

94.2 vs. 7.7

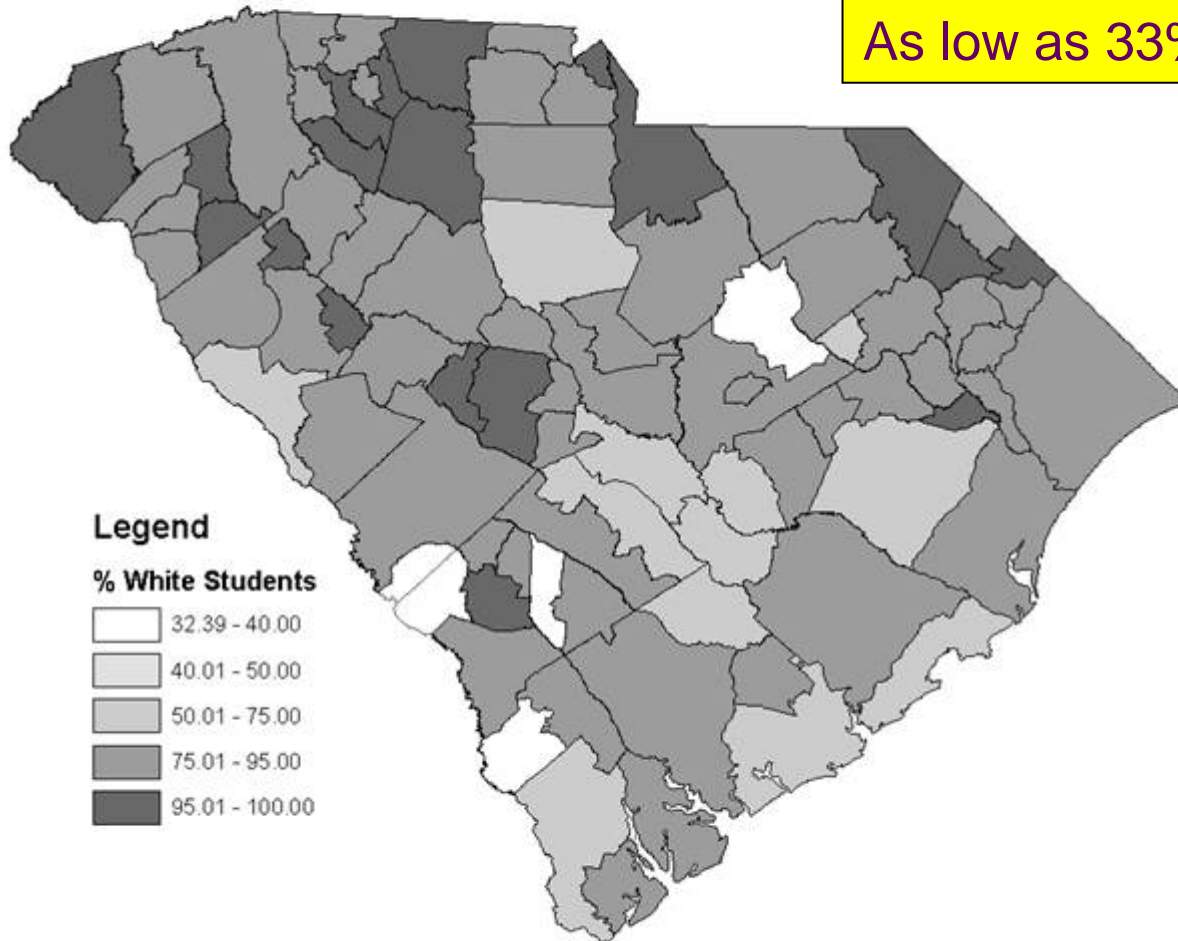
Huge differences in densities = huge differences in transportation costs
Excellent Districts are compact and affluent.

White Participation Rate in Public Schools

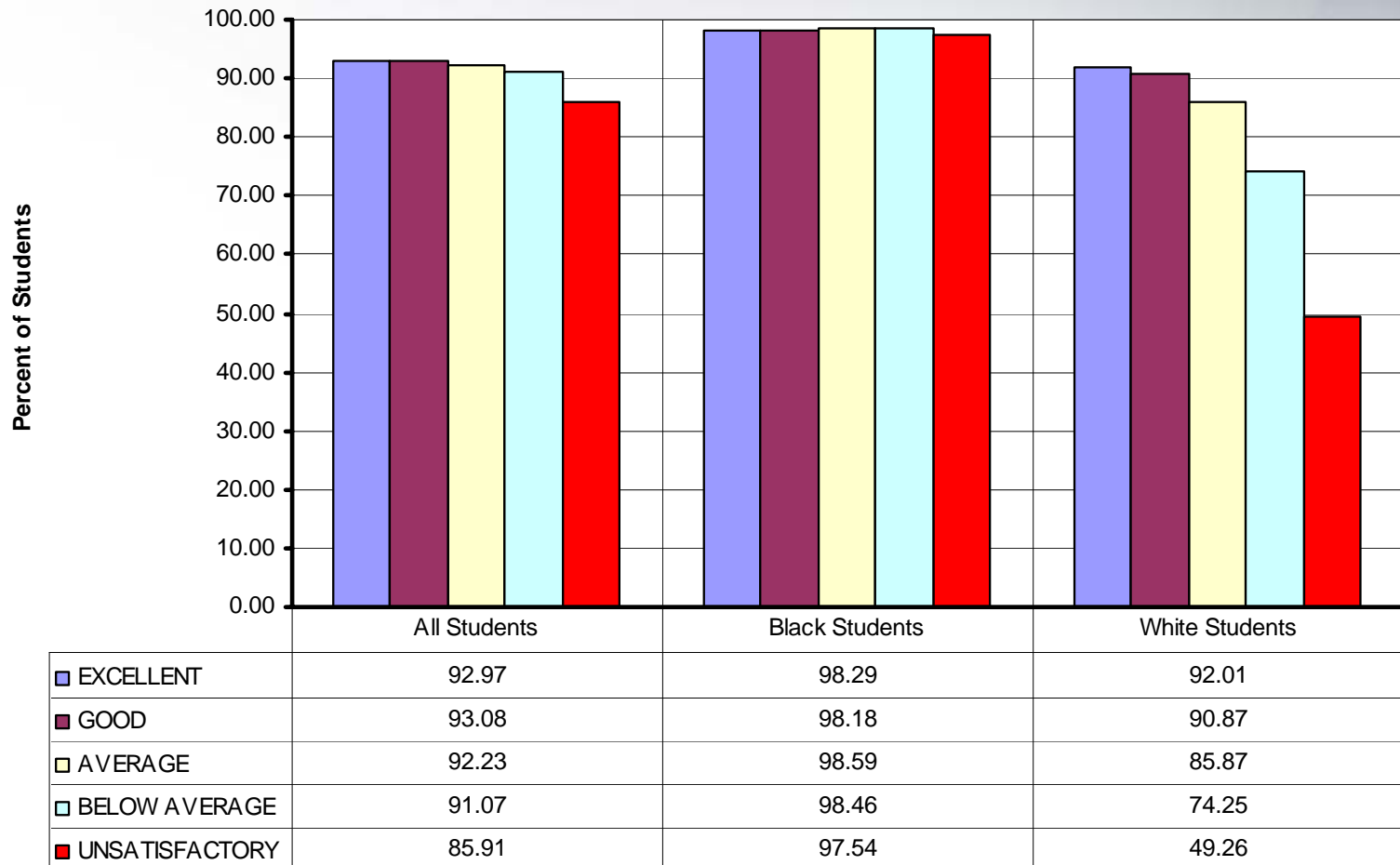


White Student Participation Rate

As low as 33%



Public School Enrollment Grades 1-8 by Race

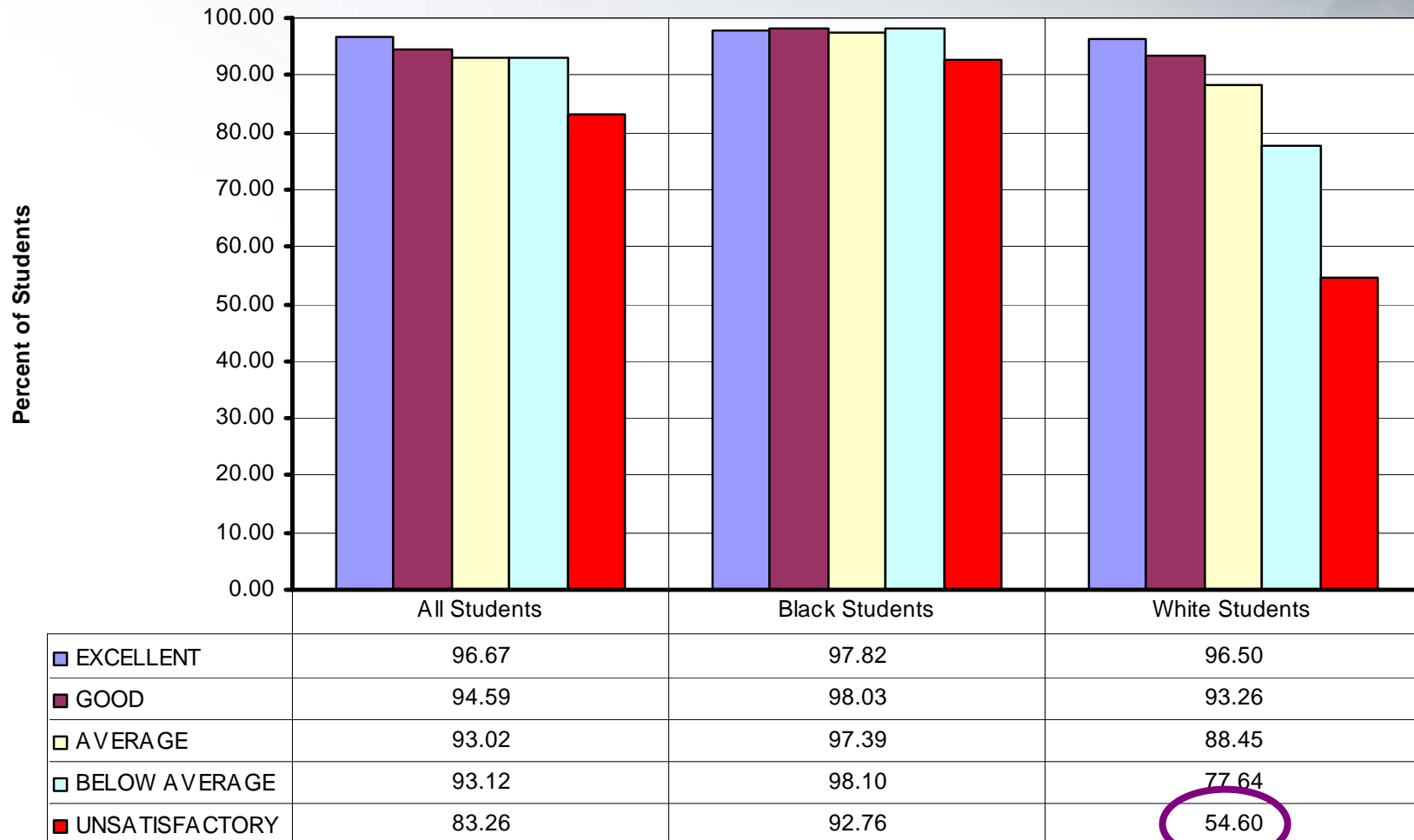


Public School Grades 9 – 12

Percent by Race



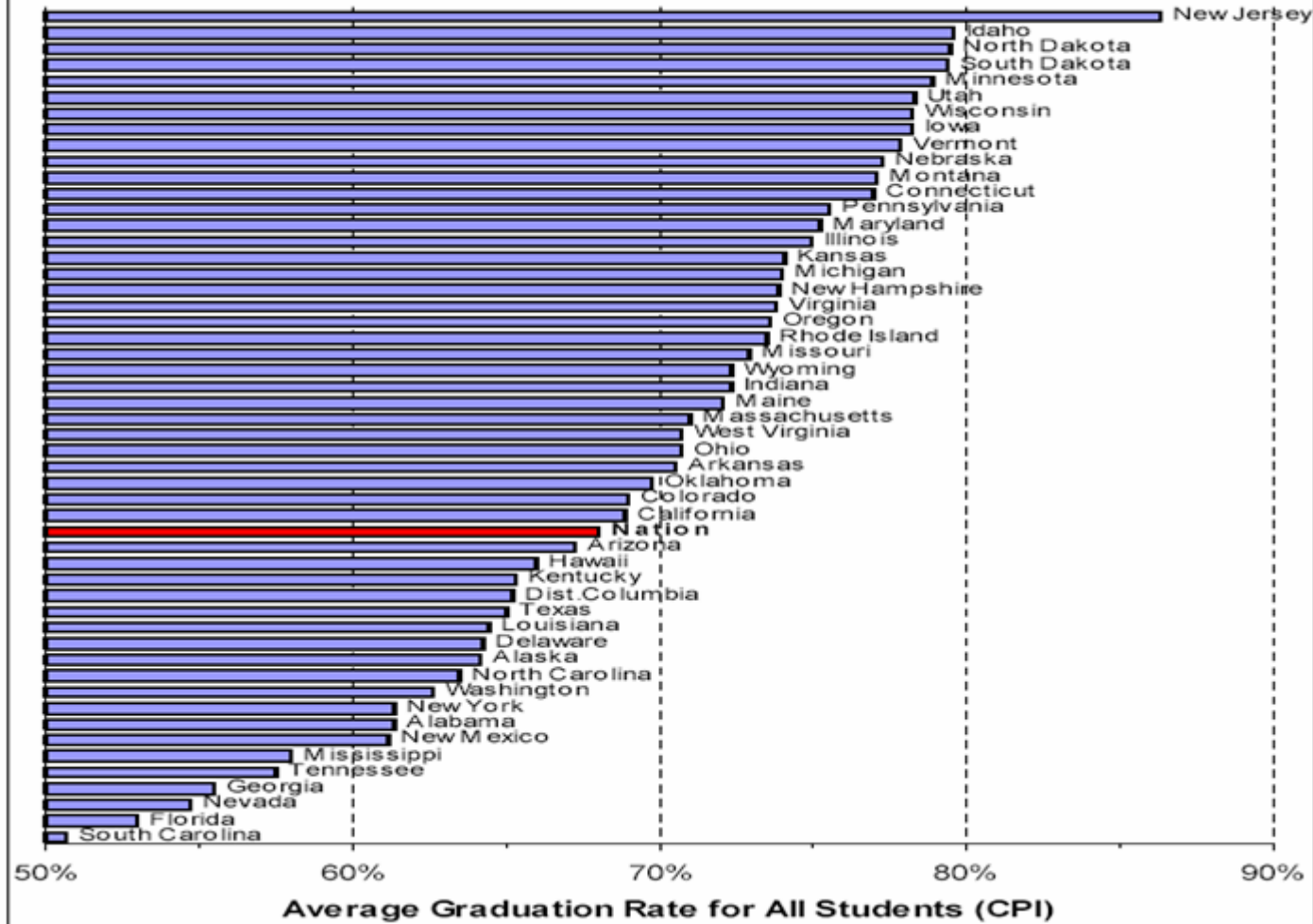
White High School Students Avoid Poorly Performing Schools



South Carolina – the worst



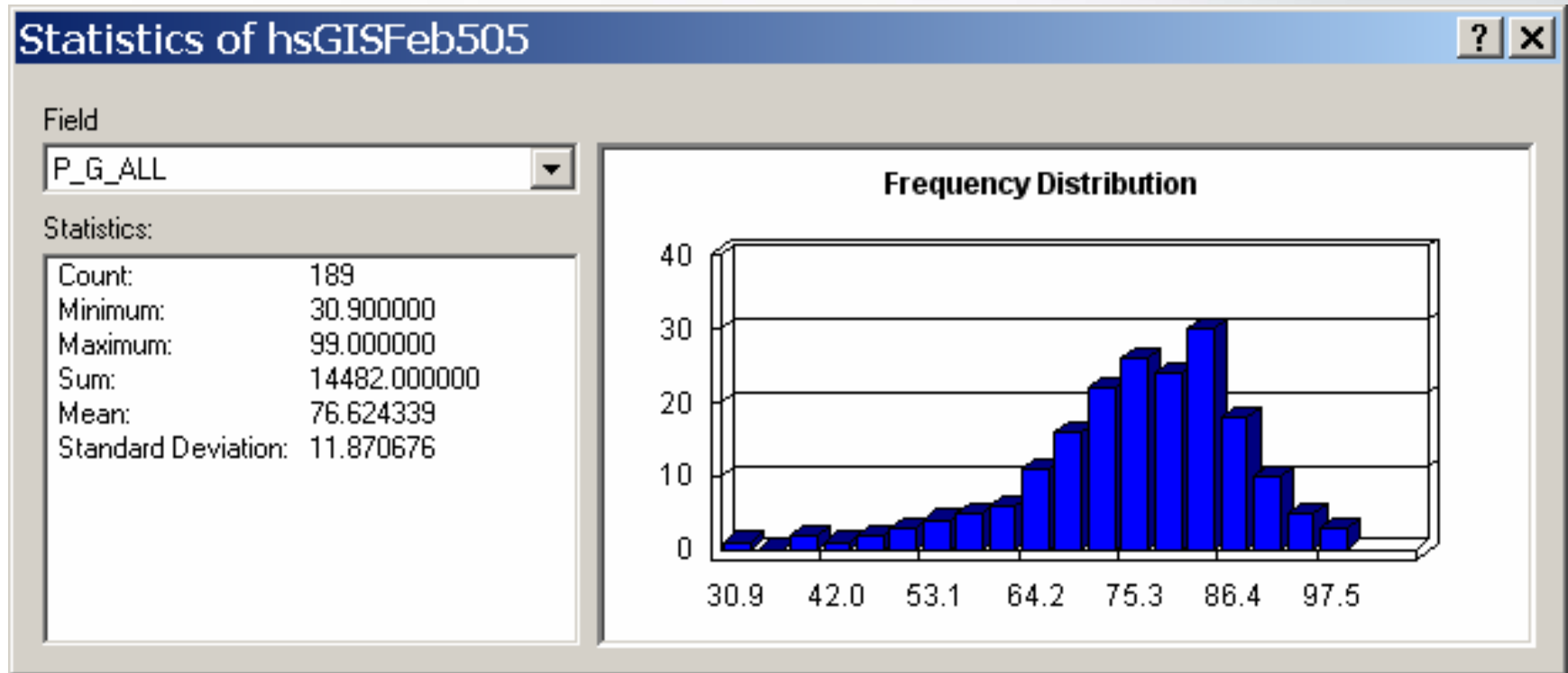
Figure 1: State Graduation Rates
for the Class of 2001



Average Graduation Rate for 189 Schools was 76.6% !!



All of our schools are above average!

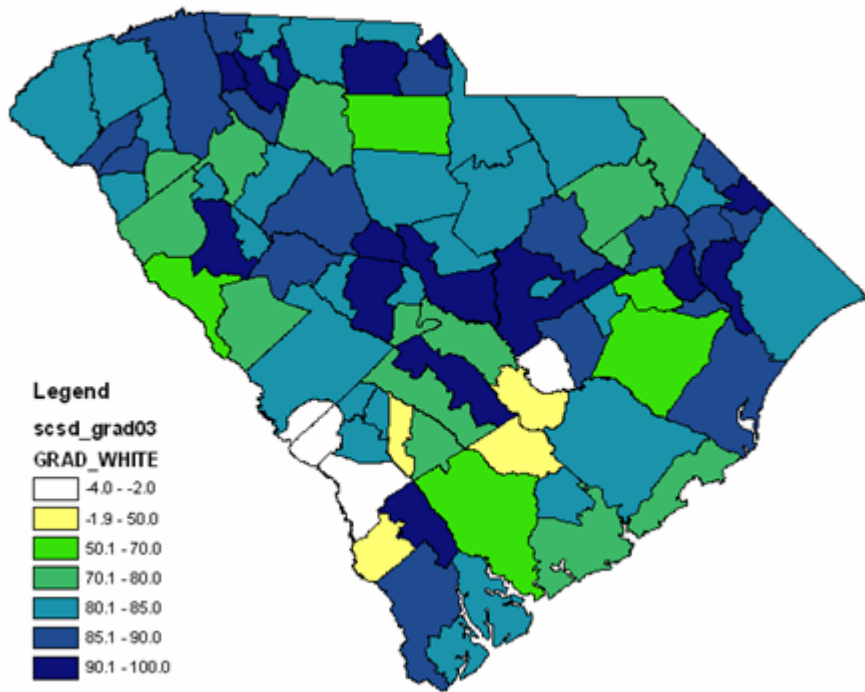


District Graduation Rates

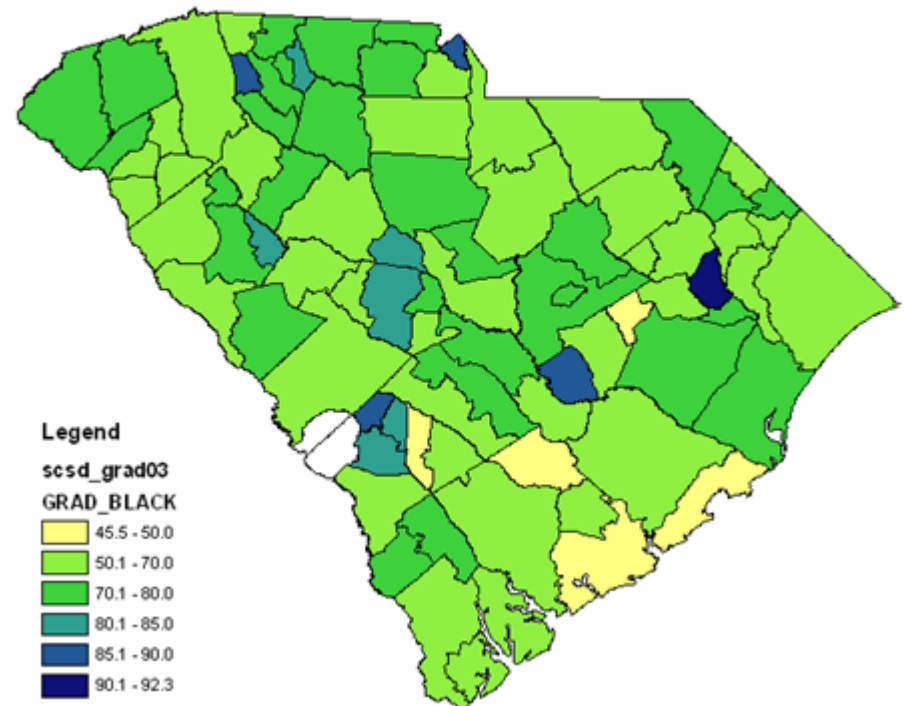
Huge Differences by Race



District Level 2003 White Graduation Rates



District Level 2003 African Am Graduation Rates



Projected School Enrollment and High School Graduates 2001 - 2013



Table A. Projected percent increases in public elementary and secondary school enrollment, by state: 2001 to 2013

Alaska	17.0	Virginia	4.3
Hawaii	16.1	South Dakota	2.6
California	15.7	New Jersey	2.5
Idaho	15.1	Michigan	2.4
New Mexico	14.9	Tennessee	2.4
Nevada	13.8	Nebraska	2.0
Wyoming	13.1	Rhode Island	1.9
Utah	12.7	Delaware	1.8
Arizona	12.0	Maryland	1.7
Texas	11.2	Kansas	1.4
Colorado	8.8	Illinois	1.2
Georgia	6.8	South Carolina	0.9
Washington	5.7	Missouri	0.5
Oregon	5.4	Indiana	0.4
Florida	5.4		
Montana	4.6		

SOURCE: U.S. Dept. of Education, NCES: Common Core of Data surveys and State Public Elementary and Secondary Enrollment Model. (See reference table 5.)

Table C. Projected percent change in the number of public high school graduates, by state: 2000-01 to 2012-13

Increases		Decreases	
Nevada	72.2	Idaho	-0.2
Florida	30.3	Alaska	-0.8
Arizona	29.6	Missouri	-2.8
New Jersey	26.7	Ohio	-3.3
Michigan	25.9	Minnesota	-3.9
California	23.1	New Hampshire	-4.8
Georgia	22.7	Arkansas	-4.9
Colorado	22.1	Hawaii	-5.2
North Carolina	20.6	Wisconsin	-6.0
Virginia	19.2	Alabama	-6.2
Connecticut	19.0	Kansas	-6.3
Texas	19.0	Iowa	-7.3
Illinois	17.5	Nebraska	-7.5
South Carolina	16.9	Mississippi	-7.5
Rhode Island	15.5	Kentucky	-9.8
Tennessee	10.7	New Mexico	-10.1
Maryland	8.6	Oklahoma	-11.5
Delaware	8.6	Louisiana	-13.8
Oregon	6.9	Maine	-15.0
Massachusetts	6.1	West Virginia	-15.9
Washington	6.0	Vermont	-17.7
Pennsylvania	4.9	South Dakota	-20.6
Indiana	4.8	Montana	-20.8
Utah	2.9	Wyoming	-25.7
New York	2.0	District of Columbia	-31.3
		North Dakota	-31.7

SOURCE: U.S. Dept. of Education, NCES: Common Core of Data surveys and State Public High School Graduates Model. (See reference table 25.)

Percent Change in Enrollment and High School Graduates 2001 - 2013



Enrollment Increase - .9 %

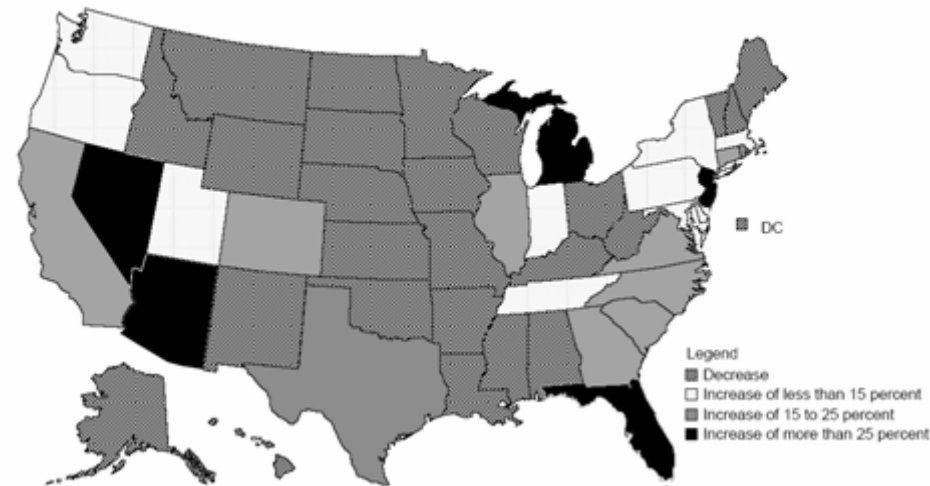
However, H.S. Graduates 16.9%

Figure 5. Percent change in grades K-12 enrollment in public schools, by state:
Fall 2001 to fall 2013



SOURCE: U.S. Department of Education, National Center for Education Statistics, The NCES Common Core of Data (CCD), "State Nonfiscal Survey of Public Elementary/Secondary Education," 2001-02, and State Public Elementary and Secondary Enrollment Model

Figure 23. Percent change in number of public high school graduates, by state:
2000-01 to 2012-13



Thanks !



- South Carolina in 2030 will be very different from what is was and is currently.
- Our economic base has changed – we need new opportunities
- We must find a way to improve our competitive advantage –
 - That can only happen by improving our labor force and retaining our talent
 - That starts and ends with education